have you had the tall?

Toolkit



Have You Had the Talk[®] is provided as a public service by Arbor Hospice.

888-992-2273 / www.haveyouhadthetalk.com

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have you had the tall? TOOLKIT INTRODUCTION

What is The Talk?

This is "The Talk" nobody talks about. You already know about the talk about sex and the one about drugs and the one about planning for college, retirement, and your last will and testament. But what about "The Talk" that helps you and the people you love navigate a medical event like a heart attack or stroke, cancer, a chronic illness like diabetes or Parkinson's, or a gradual decline in health and independence?

The **Have You Had the Talk** Campaign will help you get a conversation going with the people you love about the kind of care you'd want if ever faced with an illness or medical event where you have to rely on someone else to help you through it. This is the conversation we put off until there is an emergency. Then no one knows what to do or who to call. Think about it: if you suddenly needed the help of a loved one in a medical situation, do they know who your doctors are? What prescriptions you take? And why? Do you know who their doctors are?

Probably not.

The **Have You Had the Talk** Toolkit helps you plan for a medical emergency now – while you are in control and can speak for yourself. Then, with your plan in place, you can go back to living the best possible life.

It's easy.

- STEP 1: Clarify your thoughts and wishes.
- STEP 2: Organize paperwork and put wishes in writing.
- STEP 3: Have the Talk with the people you love.
- STEP 4: Be informed of services and resources available to help you and the people you love.

Don't put the toolkit aside. Complete it, make copies of your completed documents and share them with the people you love. Keep the toolkit in the same place at all times. If it can't be found, it can't help.

Have You Had the Talk[™] is provided as a public service by Arbor Hospice.



have you had the tall? TOOLKIT INTRODUCTION

Instructions for Completing Toolkit:

STEP 1: Clarify your thoughts and wishes.

- The Six Questions Worksheet will get you thinking. Use the worksheet to jot down your wishes and hone in on what's most important.
- Think about who you'd want to carry out your instructions and make decisions on your behalf in the event of an emergency. The person you designate as your "patient advocate" will be named on the Durable Power of Attorney in Step Two.

STEP 2: Organize paperwork and put wishes in writing.

- Once you've decided on the items in Step One, organize your medical and personal information and put your decisions in writing.
- Medical and Personal Information forms: Complete these forms. The completed document provides key information about your current health status in a format that will be easy to share with family, doctors and other emergency and health care personnel providing care and services to you. This form also provides a place to record the location of key financial and other supporting documents that will be helpful in an emergency.
- Durable Power of Attorney for Health Care: Also known as an Advance Directive, this form provides the legal framework for designating a patient advocate appointed by you to make decisions on your behalf in the event you can't speak for yourself. Before designating someone as your patient advocate, talk to them about your wishes and tell them why you have selected them. Ask their permission to name them and have them complete the form titled "Acceptance by Patient Advocate" that is part of the Durable Power of Attorney for Health Care.
- Once you have completed the Durable Power of Attorney for Health Care, ask two adults to witness as you sign the form. The witnesses cannot be members of your family, nor beneficiaries of your assets, nor medical personnel where you receive care.





STEP 3: Have the Talk with the people you love.

- Review the tips for talking with the people you love.
- Set up a time and place to have the talk.
- Tell the people you love about your wishes.
- Ask them about what they would want.
- Life and situations change. So, get a conversation going. Keep it going.

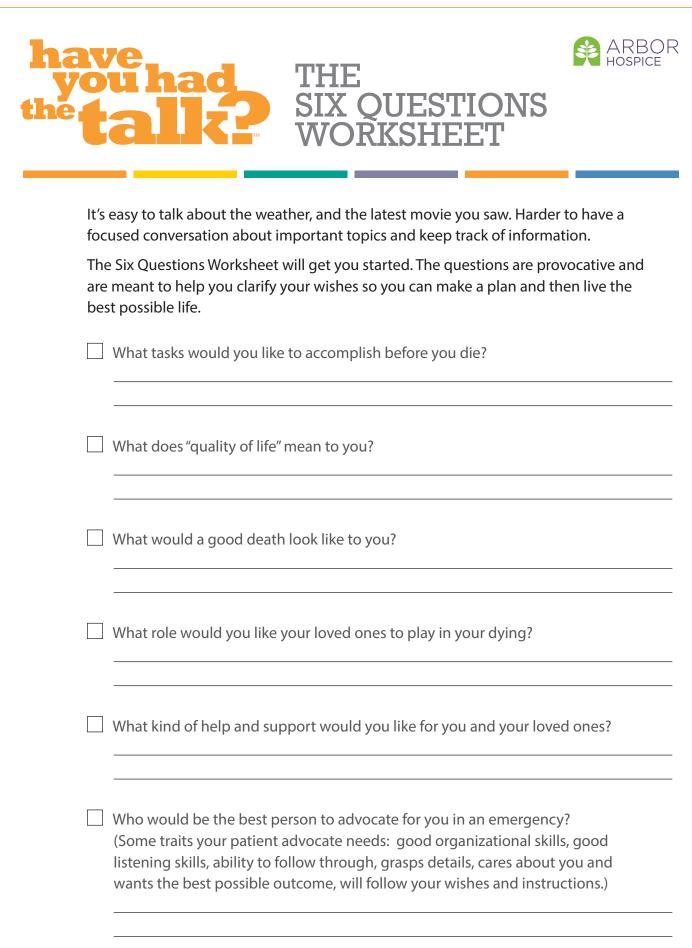
STEP 4: Be informed

- Review the Internet Resources provided.
- Be resourceful in looking for articles, books and other sources of information about health care decision making and planning.

Other Instructions:

- Use the Check List to keep track. As you complete the forms in the toolkit, check off the item on the check list.
- Make copies of the documents and share them with your loved ones, attorney, and physicians.
- Place the completed documents in a large Ziploc[™]-style bag and place in the freezer. Yes the freezer. If you keep the toolkit in the freezer, it is instantly accessible to anyone who needs it. No searching through files or a pile on your desk. If you decide to store the Toolkit in a more traditional location, be sure to tell the people who need to know where to find it.
- Keep an extra set in the glove box of your car.
- Keep a set in your safe deposit box if you have one.
- Fill out the Wallet Card with emergency contact information and place in your wallet.
- Spread the word about the importance of Having the Talk. Be an advocate for making medical wishes known.

D	u had
t	GETTING STARTED
Th	e Check List will keep you on track.
	Reviewed all documents in this toolkit.
	Made decisions about the care I want in the event of a medical emergency event.
	Selected a Health Care Advocate to make decisions on my behalf in the eve I cannot make them for myself.
	Completed the Medical and Personal Information Forms in the Toolkit.
	Secured the permission of the person I selected to be my patient advocate.
	Completed the Durable Power of Attorney for Healthcare.
	My designated patient advocate has read and signed the consent form attached to the Durable Power of Attorney.
	Two adults have witnessed my signature to the Durable Power of Attorney. (The witnesses must not be recipients of your assets and cannot be spouse child, sibling, or an employee of health care facility where you are a patient
	Made copies of all documents and gave to the following people
	Put the documents in a Ziploc [™] bag and placed in freezer or other location
	Put a copy in the glove box of my car.
	Completed the wallet card with emergency contact information.
	Set up a meeting with the important people in my life to Have the Talk.
	Had the Talk. Told the people I love about the kind of care I want if I am even faced with a serious medical event.
	Talked to the people I love about what they want.





Ottawa Personal Decision Guide™ for People Facing Tough Health or Social Decisions



You will be guided through four steps: 1 2 3 4

1 Clarify your decision.

What decision do you face?		
What is your reason for making this decision?		
When do you need to make a choice?		
How far along are you with making a choice?	 I have not yet thought about options I am thinking about the options 	 I am close to making a choice I have already made a choice
Are you leaning toward one option?	☐ Yes ☐ If Yes, which one?	□ No

2 Explore your decision.

Knowledge

Values

List the options and main benefits and risks you already know. <u>Underline</u> the benefits and risks you think are most likely to happen. Circle stars (★) to show how much each benefit and risk matters to you. 5 stars means that it matters "a lot." No star means "not at all."

Certainty

Circle the option with the benefits that matter most to you and are most likely to happen. Avoid the option with the risks that are most important to avoid.

	Benefits Reasons to use this option	How much it matters Circle 1 to 5 ★	Risks Reasons to a this optio		How much it matters Circle 1 to 5 ★
Option 1		****			****
Option 2		****			****
Option 3		****			****
Which option do you pro	efer? Doption 1	Option 2	Option 1		Jnsure
Who else is involved?	Name:	Name:		Name:	
Which option does this person prefer?					
Is this person pressuring you?	□ Yes □ No	🗆 Yes 🗆 No		□ Yes	□ No
How can this person support you?					
What role do you prefer in making your choice?	 I prefer to share the decision with				



Ottawa Personal Decision Guide™ for People Facing Tough Health or Social Decisions



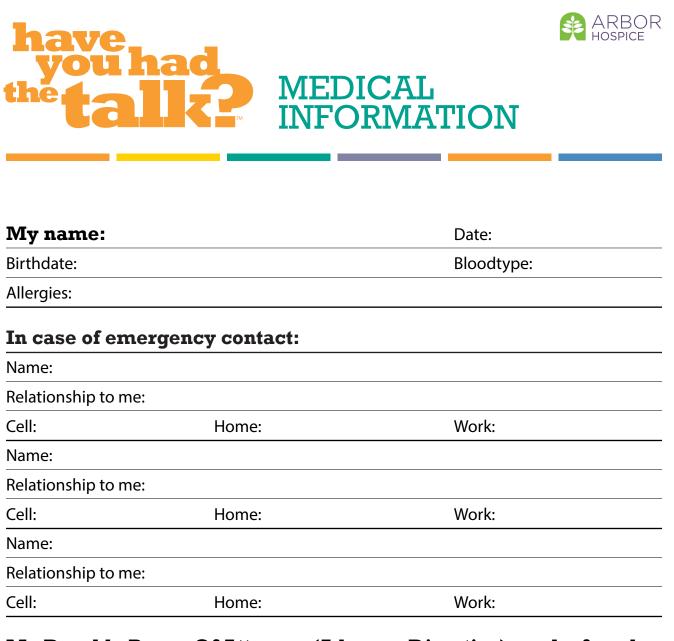
3 Identify your d	The SURE Test © 2008 O'Connor & Légaré	
Knowledge	Do you know the benefits of each option?	🗌 Yes 🗌 No
Values	Are you clear enough about which benefits matter most to you? \Box Yes \Box No	
Support	Do you have enough support and advice to make a choice?	Yes 🗆 No
Certainty Do you feel sure about the best choice for you?		🗆 Yes 🗆 No

People who answer "No" to one or several questions are more likely to delay their decision, change their mind, feel regret about their choice or blame others for bad outcomes. Therefore, it is important to work through steps 2 and 4 that focus on your needs.

4 Plan the next steps based on your needs.

Knowledge You feel you do not have enough facts.	 Find out about the chances of benefits and risks. List your questions. List where to find the answers (e.g. library, health professionals, counselors):
Values You are not sure which benefits and risks matter most to you.	 Review the stars in the balance scale to see what matters most to you. Find people who know what it is like to experience the benefits and risks. Talk to others who have made the decision. Read stories of what mattered most to others. Discuss with others what mattered most to you.
Support You feel you do NOT have enough support. You feel PRESSURE from others to make a specific choice.	 Discuss your options with a trusted person (e.g. health professional, counselor, family, friends). Find out what help is on hand to support your choice (e.g. funds, transport, child care). Focus on the opinions of others who matter most. Share your guide with others. Ask others to complete this guide. Find areas of agreement. When you disagree on facts, agree to get information. When you disagree on what matters most, respect the other's opinion. Take turns to listen, mirror back what the other has said matters most to him or her. Find a neutral person to help you and others involved.
Other factors Other factors making the decision difficult.	List anything else you need:

Ottawa Personal Decision Guide © O'Connor, Stacey, Jacobsen. 2011. University of Ottawa, Canada.



My Durable Power Of Attorney (Advance Directive) can be found:

Last updated:		
Last witnessed:		

My Last Will and Testament can be found:

Last updated:

Last witnessed:





MEDICAL INFORMATION continued

Other important documents can be found:

Diagnoses

Diagnosis	Date	Physician	Treatment	

Surgeries/Medical Procedures

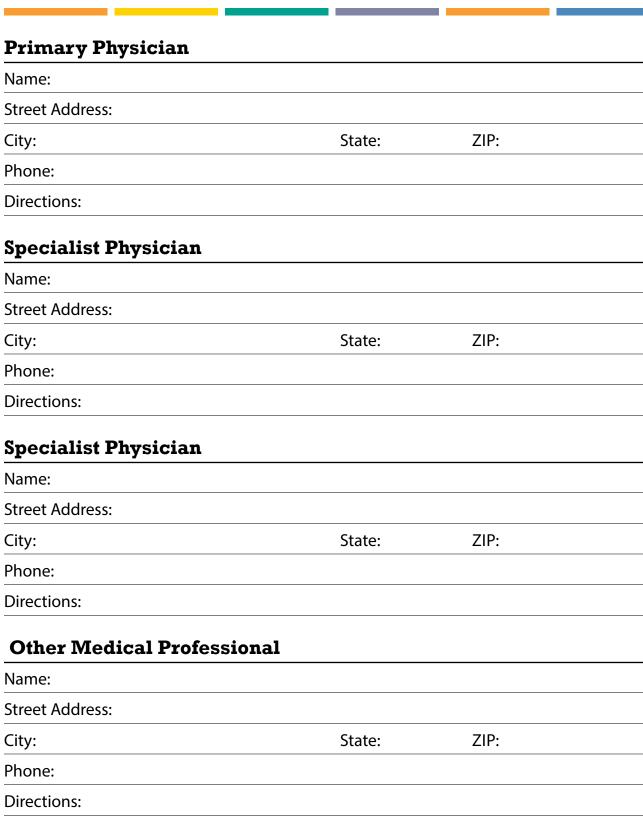
Surgery	Date	Surgeon	Hospital	

Current Medications

Prescription	Date	mg	Frequency/Instructions	Treats (condition)



MEDICAL INFORMATION continued









Other important contact			
Name:			
Street Address:			
City:	State:	ZIP:	
Phone:			
Directions:			
Other important contact			
Name:			
Street Address:			
City:	State:	ZIP:	
Phone:			
Directions:			
Other important contact			
Name:			
Street Address:			
City:	State:	ZIP:	
Phone:			
Directions:			
Other important information			

have you had the talk? DURABLE POW FOR HEALTH (VER OF ATTORNEY	
I,	, am of sound mind, a	nd I voluntarily
make this designation. I designate	FULL NAME OF PATIENT ADVOCATE	, my
, living at	ADDRESS, CITY, STATE OF PATIENT ADVOCATE	as
my patient advocate to make care, custody and medical to to participate in medical treatment decisions. If my first c		t l become unable
FULL NAME OF PATIENT ADVOCATE SUCCESSOR	, my SPOUSE, CHILD, FRIEND, ETC.	_, living at
ADDRESS, CITY, STATE OF PATIENT ADVOCATE SUCCESSOR	to serve as patie	ent advocate.
The determination of when I am unable to participate in r attending physician and another physician or licensed psy		nade by my
In making decisions for me, my patient advocate shall foll expressed orally, in a living will, or in this designation.	ow my wishes of which he or she is aw	vare, whether
My patient advocate has authority to consent to or refuse for me, including admission to a hospice program, hospita with my funds. In addition, my patient advocate has author treatment and—upon my death— make decisions regard HIPAA requirements stated on the back of this document records to which I have a right.	al or nursing care facility, and to pay fo ority to make decisions regarding my r ling organ donation. I have read and u	nderstand the
I expressly authorize my patient advocate to ma which would allow me to die and I acknowledge My patient advocate can sign a do-not-resuscita refuse food and water administered to me throu	e such decision could or would allow n ite declaration for me. My patient advo	ny death.
SIGN YOUR NAME HERE IF YOU WISH TO C	SIVE YOUR PATIENT ADVOCATE THIS AUTHORITY	
My specific wishes concerning health care are the followir	ng (if none, write "none"):	





DURABLE POWER OF ATTORNEY continued

I may change my mind at any time by communicating in any manner that this designation does not reflect my wishes.

It is my intent that my family, the medical facility, and any doctors, nurses and other medical personnel involved in my care shall have no civil or criminal liability for honoring my wishes as expressed in this designation or for implementing the decisions of my patient advocate.

Photostatic copies of this document, after it is signed and witnessed, shall have the same legal force as the original document.

I sign this document after careful consideration. I understand its meaning and I accept its consequences.

Dated: _____

Signed: _____

Address: _____

NOTICE REGARDING WITNESSES

You must have two adult witnesses who will not receive your assets when you die (whether you die with or without a Will), and who are not your parent, spouse, child, grandchild, brother or sister, physician or employee at the health care facility where you are a patient.

STATEMENT OF WITNESSES

We sign below as witnesses. This declaration was signed in our presence. The declarant appears to be of sound mind, and to be making this designation voluntarily, without duress, fraud or undue influence.

Signed by Witness:
Type or print full name:
Address:
Signed by Witness:
Type or print full name:
Address:

The HIPAA Privacy Rule:

In short, the Privacy Rule ensures that your "protected health information" (PHI) cannot be shared without your permission. All entities who have access to your health records, such as hospitals, physicians, pharmacies and hospice providers, are required to abide by this law. The rule applies specifically to information that could be deemed "identifiable." Individually identifiable health information includes many common identifiers (e.g., name, address, birth date, Social Security Number). By granting authority to your patient advocate, you are entrusting him or her to represent your privacy interests with respect to HIPAA.





DURABLE POWER OF ATTORNEY continued

ACCEPTANCE BY PATIENT ADVOCATE

- (A) This designation shall not become effective unless the patient is unable to participate in treatment decisions.
- (B) A patient advocate shall not exercise powers concerning the patient's care, custody and medical treatment that the patient, if the patient were able to participate in the decision, could not have exercised on his or her own behalf.
- (C) This designation cannot be used to make a medical treatment decision to withhold or withdraw treatment from a patient who is pregnant that would result in the pregnant patient's death.
- (D) A patient advocate may make a decision to withhold or withdraw treatment, which would allow a patient to die, only if the patient has expressed in a clear and convincing manner that the patient advocate is authorized to make such a decision, and that the patient acknowledges that such a decision could or would allow the patient's death.
- (E) A patient advocate shall not receive compensation for the performance or his or her authority, rights, and responsibilities, but a patient advocate may be reimbursed for actual and necessary expenses incurred in the performance of his or her authority, rights, and responsibilities.
- (F) A patient advocate shall act in accordance with the standards of care applicable to fiduciaries when acting for the patient and all act consistent with the patient's best interest. The known desires of the patient expressed or evidenced while the patient is able to participate in medical treatment decisions are presumed to be in the patient's best interests.
- (G) A patient may revoke his or her designation at any time or in any manner sufficient to communicate an intent to revoke.
- (H) A patient advocate may revoke his or her acceptance to the designation at any time and in any manner sufficient to communicate an intent to revoke.
- (I) A patient admitted to a health facility or agency has the rights enumerated in Section 20201 of the Public Health Code, Act N. 368 of the Public Acts of 1978, being Section 333.20201 of the Michigan Compiled Laws.
 I understand the above conditions and I accept the designation as patient advocate for:

Patient Name:	
Dated:	_Signed:

Provided by Arbor Hospice, www.arborhospice.org. This document is for your information and is not designed to replace the counsel of your attorney. REV. 3/11



have you had TIPS FOR HAVING THE TALK

"Having the Talk" is simply about preparing in advance to deal with a medical event – even a routine one. Sharing your plans will give your loved ones confidence to assist you with a health related matter. Once you "have the talk," your loved ones will have all the information they need: your health status, your doctors, prescriptions, your wishes, and their role in assisting you.

"Having the talk" is a practical step to take and it provides you and your loved ones with an opportunity to have a meaningful conversation about some of the big issues in life. Once you get this conversation going, you may be surprised at how enjoyable and enriching it is, and you might be surprised by what people say!

Here are some tips:

- Let your loved ones know you want to meet and share the plans you have made in the event of a routine medical procedure or other health-related event.
- Set a time and place and have a set plan for the information you want to share. (If it's hard to find a time when everyone can meet, choose a time when you already know you'll be together like Thanksgiving or other holiday.)
- Select a location where you can talk comfortably.
- Have a specific timeframe for going through your plan and sharing your wishes. Two hours allows plenty of time to share the information and have a lively conversation about what you and your loved ones would want when faced with a medical situation.
- Getting together for "the talk" can and should be an enjoyable event. Have refreshments and encourage everyone to be comfortable.
- Make copies of all of your documents so they can be shared.
- Expect that there will be distractions and that the subject will be changed as the conversation gets going.
- Be prepared to bring the conversation back on track so that you accomplish the goals for the meeting.

(continued)



the talk? TIPS FOR HAVING THE TALK continued

Topics to consider:

- Where to find medical information about you. Show them the toolkit. Show them the forms you completed. Now easy to find, they will know all of your doctors, prescriptions and diagnoses. Tell them where you will be keeping it.
- Current health status. Even if you are in perfect health, let them know. It is not uncommon to be presented with a routine procedure. If you go to the hospital, your family will have all the information they need to assist you. If you've been ill or had surgeries, give them an overview of what you have been dealing with. Don't get bogged down in details at this point.
- Let them know who you have selected to be your "patient advocate." (Make sure this person already has agreed to be your advocate and understands their role.)
- Tell them some of the situations you have considered and the kind of care you would want. These decisions are not set in stone. They can be changed at any time. The idea is to get family members to understand your basic philosophy about these matters so that they know what you'd want and can help ensure you get the care you'd want.
- Ask them if they have thought about the care they would want. Get them talking about their wishes and encourage them to follow a process to select a "patient advocate" and complete a process like the one you have.
- Ask them if they have questions.
- If there are conflicts in the family, this is an especially good time to talk about your wishes. Conflicts can be prevented during health care events by getting all parties on the same page in advance when it's clear that plans have been made by you for you.



have you had internet RESOURCES

This list of not-for-profit resources was compiled to help you make informed choices about end-of-life issues. Information is available from these organizations at no cost to you. Generally speaking, if it isn't free, or they ask for anything besides your address... you don't want it!

Caring Connections

www.caringinfo.org

State-specific Advance Directives with instructions are available for free download after registration of name and email address. About *How You LIVE* empowers consumers to take action; specifically the campaign encourages people to: learn about your options for end-of-life services and care; implement plans to ensure your wishes are honored; and voice your decisions to family, friends and health care providers.

Caring Conversations

www.practicalbioethics.org/cpb.aspx?pgID=886

The Caring Conversations workbook provides a social ritual that helps loved ones plan for the end of life. Sharing the information in Caring Conversations allows others to understand and respect the preferences of patients who can no longer speak for themselves and eases the tension that patients and their families experience during a last illness. The workbook (also available in Spanish) is intended to help you, your family, and your friends think about these issues now, while you are able to respond to specific questions.

Compassion & Choices

www.compassionandchoices.org

www.funerals.org

www.giftoflifemichigan.org

Compassion & Choices is a not-for-profit organization working to improve care and expand choice at the end of life. As a national organization with over 60 chapters and 30,000 members, Compassion & Choices helps patients and their loved ones face the end of life with facts and choices of action during a difficult time. They aggressively pursue legal reform to promote pain care, put teeth in advance directives and legalize physician aid in dying.

Funeral Consumers Alliance

The Funeral Consumers Alliance is a nonprofit organization dedicated to protecting a consumer's right to choose a meaningful, dignified, affordable funeral. They offer information on funeral choices to increase public awareness of funeral options, including how to care for your own dead without using a funeral home. The \$10 end-of-life planning kit: Before I Go, You Should Know – is the only item in this resource list that is an exception to the rule – if it isn't free, you don't want it.

Gift of Life

Gift of Life is the only not-for-profit full service organ and tissue recovery organization in Michigan since 1971. As an organization, the Gift of Life acts as an intermediary between the donor hospital and the recipient transplant center providing all of the services necessary for organ and tissue donation. The website has an online registry.



INTERNET RESOURCES continued

Arbor Hospice

www.arborhospice.org

Arbor Hospice provides comprehensive, compassionate comfort care to people with acute chronic illness and support to their loved ones. Arbor Hospice has served patients and families throughout southeast Michigan since 1984. The Open Access Policy assures that Arbor Hospice will care for all who need and seek end-of-life services, regardless of age, diagnosis or financial circumstances. The website offers an extensive array of resources for patients, caregivers and the medical community.

National Hospice and Palliative Care Organization

www.nhpco.org

www.pbs.org/wnet/onourownterms

Hospice and palliative care involve a team-oriented approach to expert medical care, pain management, and emotional and spiritual support expressly tailored to the patient's needs and wishes. Support is provided to the patient's loved ones as well. At the center of hospice and palliative care is the belief that each of us has the right to die pain-free and with dignity, and that our families will receive the necessary support to allow us to do so.

On Our Own Terms – Bill Moyers

There is a great divide separating the kind of care Americans say they want at the end of life and what our culture currently provides. Surveys show that we want to die at home, free of pain, surrounded by the people we love. But the vast majority of us die in the hospital, alone, and experiencing unnecessary discomfort. Bill Moyers goes from the bedsides of the dying to the front lines of a movement to improve end-of-life care in ON OUR OWN TERMS: Moyers on Dying.

Peace of Mind

www.legislature.mi.gov/documents/Publications/PeaceofMind.pdf

This free online booklet is designed to assist you in preplanning: personal records, medical records and forms on Michigan's Statutory Will and Patient Advocate law and organ donation. This booklet is not intended to replace the advice of a legal professional when it comes to making long-term care and end-of-life decisions. For additional information, or if you are in need of a referral for legal counsel, please contact: State Bar of Michigan at (800) 968-1442.



Have You Had the Talk Campaign is brought to you by Arbor Hospice.

- Arbor Hospice provides expert, high quality, compassionate care to people who have lifelimiting illnesses, and support for families.
- Research shows that people who use hospice services live longer and have significantly better quality of life than those who do not elect to use hospice services.
- 4. Choosing hospice to help patients through a lifelimiting illness is not giving up hope. It is a change in tactics. Arbor Hospice maximizes quality of life through expert care and significant support to the patient and family members.
- 5. Arbor Hospice, a member of the NorthStar Care Community, serves more than 1,600 people annually across southeast Michigan.
- 6. Approximately 29% of referrals to Arbor Hospice are made by a family member or the patient themselves. All you have to do is call.
- You don't have to wait for a physician or nurse to refer you to hospice, you can call Arbor Hospice anytime, day or night.
- 8. Arbor Hospice provides hospice care in patients' homes, assisted living centers, nursing homes and hospitals, or wherever a patient calls home.

- 9. All hospices are not alike. You have a legal right to choose your hospice.
- Using the resources of the NorthStar Institute, Arbor Hospice works to improve the care of the dying in Michigan through advocacy, education, legislation, research, and more.

ARBOR

- 11. Arbor Hospice is a not-for-profit hospice. This is an important distinction among hospices. Arbor Hospice's mission is to serve all who need and seek care regardless of the person's age, diagnosis or financial circumstances. Unlike for-profit hospices, Arbor Hospice does not have the objective of earning a profit. The focus is to provide the best possible care to patients and their families.
- 12. Arbor Hospice raises more than \$775,000 each year to support a mission to serve all who need and seek care. As a not-for-profit organization, the community provides financial support through donations to ensure the maximum benefit to our patients and the community.
- To make a donation in support Arbor Hospice, call (800) 669-9335 or visit www.arborhospice.org/ donate.
- 14. At Arbor Hospice, hospice care is all we do. We are experts at caring for people at this important stage of life.
- 15. Arbor Hospice: ask for us by name.



In Case of Emergency (ICE) Cards

Get Coveniend 🗹 Take Control



Fill out these eards and distribute them to make some everyone lowers where to call

In Case of Emergency (ICE)

OT MADE ACCELL ACI Harm Flance which Reason LEA LY CONTACT & COOA Haras Phores ru fines Raintin white Rubel and a second as DML ITT FOR EM Harm Phores Johds Phon Harm Repow hile Reserve taistin militar Calendary March March Additional information of listen dien ----DOR 8.000TPE DOL BLOOD TYPE ACDA ACDA DIALETT FOR EXEMPLEMENTS 87 NA88 **277 MARCA** ACCESS. Haras Pierras Harse Form Harm Phores Redector white A-44-----DAL ET 1 FOL EINERS INCHS DIAL ITT FOR EXEMPLE **Additional Information** Additional information CONTRET OF CONTACTOR Here Avre Bolds Phone h Rom Raintia atipa غنير طائعيد enal-lation die s ----LOODTHE DCR LOODTYPE DCR ALASTERS: ANDA ANDA DIAL (7) 1 FOR EXCERNIC IN DIAL UT ACREMENTE

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