

HOSPICE GIVING FOUNDATION

Life Stages: Financial Planning for Peace of Mind

IN THE EVENT OF A HEALTHCARE EMERGENCY: Checklist of Tasks

When a healthcare emergency takes place decisions may need to be made quickly. Other tasks may need to be addressed to ensure safety and security of others. Depending on the situation, you will need to determine which issues take priority over others.

Healthcare Decision Making

- Determine if an advance directive or POLST is in place
- Identify who is the healthcare proxy or holds a Durable Power of Attorney
- If no one is identified, initiate the legal process to obtain Durable Power of Attorney
- Locate insurance and/or Medicare cards
- Arrange to meet with the medical team within 24 hours
- If you are traveling to the situation from a distance, arrange for a trusted friend or relative to be on site to stay abreast of the patient's status

"It's understood that during highly emotional times it can be difficult to make good financial decisions. Consulting with professionals early on in the process can help minimize decisions that have unintended financial consequences."

Make the Calls

- Identify who needs to be notified right away – family, friends, neighbors, employers, and/or caretakers
TIP: Address books, cell phone, computer contact lists, and caller ID records can help provide current information
- Gather the names and contact information for all healthcare providers

Arrange for Care

- Of minors
- Spouse or partner who may need assistance
- Pets

"Clear, consistent, and calm communication with relatives and friends is key to good decision making and crisis management."

Develop a Communications Plan

- Identify a point person to field phone calls and be clear about what information they can share and what they cannot; remember to honor the privacy wishes of your loved one
- Consider registering with a program such as CaringBridge.com to share information, receive messages of support, and/or to coordinate help from family and friends

Arrange for Security

- Check that the home, business, or related property is properly secured and managed
- Check to see if there is a contact list for someone who can assist with these details
- If there is no contact list, ask a trusted friend to step in for these tasks



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Gather Information:

- Locate important documents
- Check the mail – determine who will do this ongoing
- Determine any other home delivery items and services and process holds (such cleaning services, meal deliveries, newspapers, subscriptions, etc.)
- Contact attorney, accountant, and executor of estate
- Handle financial matters, such as paying bills

