

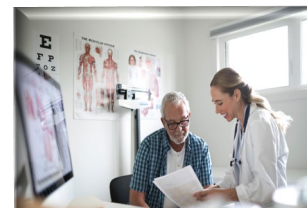
The Caregiver Toolbox

Planning Ahead—Important Documents

WHAT are Important Documents?

ANY Document That Provides Information About Your:

- Legal Wishes During Life And After Death
- Legal Contracts And Binding Documents
- Assets And Investments
- Financial Status & Benefits
- Health Insurance & Benefits
- Planning Professionals' and Medical Providers' Contact Information
- Passwords To Online Accounts And Other Information About Them
- Family And Friends' Contact Information



WHERE Should You Keep Important Documents?

- *All Together* as much as possible.
- Secure location in house like a fireproof safe.
- Copies in a *second* location.
- Safe Deposit boxes in Banks- These are safe but may not be accessible to anyone whose name is not on the contract. So do not store documents that family might need to access immediately here unless that person's name is on the account.
- *In a location* where family members (you wish) can access should you be unavailable for whatever reason.

TELL your family of these locations!

ACCESSING Attorneys, Financial Planners & Other Planning Professionals

- Provide Advice *and* Guidance.
- *Provide Proper* Execution of Wishes.
- Make sure the person is licensed and credentialed in the state in which the individual hiring services lives.
- Ask about the professional's specializations (many of them serve certain populations or specialize in one area of their field.).
- **Ask and expect** clear, written information about fees.
- How to Find Professionals:
 - Check professional association websites.
 - Ask other professionals you trust.
 - Ask friends for references.

Helpful Websites

Find *up to date* legal information on these websites and links to *BLANK* documents for Ohio:

- www.ohiolegalhelp.org
- www.proseniors.org
- www.ohiobar.org
- www.ohiodisabilityrights.org



Powers of Attorney In Ohio

- **Health Care and Financial Powers of Attorney** are two *DIFFERENT* legal instruments in Ohio. Some states call this naming a “Proxy” or an “Agent” (which means a person to carry out your wishes when you cannot).
- Typically, they are used when you are *UNABLE* to make your own decisions any longer. You can grant them to 2 different persons or both to the same person.
- You can name a *PRIMARY PERSON* and several alternates if that person is unavailable.
- *YOU GRANT* them when you are healthy and *YOU* can revoke them at any time when you are healthy.
- They cannot be changed or revoked by anyone else but you.
- You do *not* need a lawyer to complete these documents. However, they do need to be witnessed and/or notarized in Ohio.
- They end at your death.



Living Will in Ohio



- A legal document that specifies your wishes to doctors regarding the use of life-sustaining treatments if you should become terminally ill or permanently unconscious.
- It becomes effective *ONLY* when you are unable to communicate your wishes.
- You do not need a lawyer to complete this document.
- You can change or revoke it at any time but it cannot be changed or revoked by anyone but you.

Organ and Tissue Donation in Ohio

- The Ohio Donor Registry was established in July 2002.
- It provides Ohioans the opportunity to give legal consent to be an organ, eye and tissue donor at the time of death.
- An individual may sign up anytime online at www.donatelifeoio.org or, by saying “yes” when receiving or renewing their driver license or state ID at the Bureau of Motor Vehicles.
- Hard copy forms are also included in the Ohio Advance Directives packet which is linked at www.coaaa.org and the websites listed earlier.

Do Not Resuscitate Order in Ohio

- An order issued by a medical provider which says that a person does not want different forms of Cardiopulmonary Resuscitation (CPR).
- Ohio’s DNR order relieves emergency medical services(EMS) personnel and other medical professionals and facilities of their *DUTY* to resuscitate a person if they are presented with this document.
- There are *TWO* kinds of Orders in Ohio: Comfort Care or Comfort Care-Arrest.
- The difference between them is *WHEN* they are invoked.
 - Comfort Care-Arrest is *ONLY* invoked when a person is suffering from cardiac and/or respiratory arrest.
 - Comfort Care is invoked immediately upon the onset of any emergency incident requiring life saving intervention.
- These orders can be revoked by the person through his/her healthcare provider at any time.
- For more information and to download a blank form, go to the Ohio Dept. of Health website (www.odh.ohio.gov) and search for Do Not Resuscitate Orders.

Guardianships in Ohio

- Under Ohio law, if you are mentally impaired to the point that you cannot take proper care of yourself, your property or those for whom you are legally responsible, you may be determined incompetent and have a guardian appointed.
- A guardian may be appointed over the person or the estate or both.
- A GUARDIAN OF THE PERSON is responsible for the physical care of the person.
- A GUARDIAN OF THE ESTATE is responsible for the person's finances.
- THE COUNTY PROBATE COURT appoints and manages all guardianships in Ohio. To obtain information or application forms, contact your county probate court.

Wills in Ohio

- A will is a formal document that lets you provide for the distribution of your estate when you die.
- An estate consists of any property you own at death:
 - Real Estate Property (Land)
 - Personal Property (Stocks, Bank Accounts, Cars)
 - Intangible Property (Claims, Interests, Rights)
- Ohio law permits anyone 18 or older, with sound mind. Your will must be in writing. You must date and sign the will in front of two competent witnesses.
- In your will, you will name an "Executor," which is a person who has responsibility for representing you after your death and distributing your goods between those listed in your will.
- In the case of multiple wills, the one legally executed the most recently will be binding.

Other After Death

Declarations

- Ohio allows many other documents to have "Transfer on Death" options.
- These include vehicles, bank accounts, & property.
- Many people execute these documents while they are still healthy and competent.



This information is provided by: The National Family Caregiver Support Program



This is a nationally funded program operated in Central Ohio by the Central Ohio Area Agency on Aging (COAAA). It offers caregiver workshops and funds services designed to assist caregivers on a short term basis. The services include: information and assistance, counseling, respite, and other supplemental services.

Request a copy or download our other guide from our website www.coaaa.org:

- Central Ohio Older Adults Resource Guide
- The Caregiver Toolbox
- Central Ohio Long Term Care & Hospice Guide
- Central Ohio Housing & Home Repair Guide
- Central Ohio Private Homecare Guide
- Central Ohio Utility Guide
- Central Ohio Prescription Guide
- Central Ohio Transportation Guide
- Central Ohio Support Group Guide
- Central Ohio Respite Guide
- Central Ohio Moving & Transitions Guide
- Books, Videos, and Websites for Family Caregivers.
- Central Ohio Kinship Care Guide (New)
- Central Ohio Hiring Guide for In Home Caregivers (New)
- Central Ohio Pet Care Guide (New)

The COAAA also provides monthly Caregiver Support Groups & Information Sessions. For more information, call 1-800-589-7277 or visit our website.

Or in your county, call one of these agencies:

- **Delaware**-SourcePoint 740-363-6677
- **Fairfield**-Meals on Wheels Older of Fairfield County 740-681-5050
- **Fayette**-Community Action Commission of Fayette Co. 740-335-7282
- **Franklin**-Franklin Co. Office on Aging 614-525-6200
- **Licking**-Licking Co. Aging Program 740-345-0821 or 1-800-452-0097
- **Madison**-Madison Co. Senior Center 740-852-3001
- **Pickaway**-Pickaway County Senior Center 740-474-8831
- **Union**-Union County Senior Services 937-644-1010