

Wellness Matters – Rob Olmsted

GETTING YOUR DOCUMENTS TOGETHER – More than just paperwork

The tax season is upon us. We all know this is a task that goes beyond just tedious paperwork, as it has serious implications if left undone. My experience of Lathrop residents is that they are planners – from the beginning of the decision process to making their move, all have to some degree been planning for the life changes that are coming, perhaps by settling in closer to family, building a community network or partnering with Lathrop services.

We know there will be a time when help will be needed, and part of planning is identifying someone we trust who may help make or implement decisions on our behalf. There are two crucial tools, identified as part of your Lathrop Residency Agreement, which will help secure your fiscal, legal and health care intentions, and also ensure that Lathrop as a community respond accordingly.

HEALTH CARE PROXY (HCP) - This document is considered a legal advanced directive in Massachusetts. It identifies an individual, along with an alternate, who can make a medical decision on your behalf should you be unable to. Each resident upon entry has provided the name of an HCP, and it has been discussed and confirmed at each formal Wellness check-in. *Our office was slow to realize that we needed to gather and keep that document on file as required by the Residency Agreement.* If you have attended any of the Mortal Mondays or previous presentations by resident Mark Peterson, you have heard much about the choices that one should be prepared to make. Having a dedicated proxy assigned also assumes that you have had an honest conversation about your wishes. The HCP assignment is a simple document which does not require a lawyer to complete, nor does it need to be notarized. Two witness signatures are all that is needed, and it can be changed whenever needed. You can learn more about the relevant state laws and learn more about end of life planning at <https://www.mass.gov/info-details/massachusetts-law-about-health-care-proxies-and-living-wills>.

Those who wish to be more explicit about limiting treatment or medical intervention can pursue completion of the MOLST form, or provide your proxy with guidance through a non-binding Living Will or similar statement of your wishes. Reach out to Erin or me if you would like help with this.

DURABLE POWER OF ATTORNEY (DPOA) – This document, best prepared by an attorney, empowers a trusted person to act on your behalf in legal, financial and property matters should you become incapacitated. This document does require both witnesses and notarization. Legally married couples in most situations serve this function for their joint estates, but there may well be situations where having a third party prepared to step in is essential. Here I think the importance of having a path forward in settling a resident's legal relationship with Lathrop can be seen as an important community interest. My assumption is that residents have spent time with an attorney to make sure they have arrangements in place. We can provide names of local attorneys, but have to step back when it comes to advising on such planning.

Part of everyone's entry process was providing those names. We also know that situations change and these documents may need to be adjusted. Our office is actively checking the files to confirm from whom we have already received copies of these two essential documents (more recent residents are more likely to have something on file). *Please have a look at your own files to make sure that you are up to date, make some copies if you suspect you never submitted them. For many, you can expect a reminder from the Wellness office.* It is good to be prepared!