

## PAD Facilitators Checklist

### Before the facilitation meeting:

- ✓ Introduce the idea of the PAD and the facilitation process to the person
- ✓ Give the person informational material and things to think about before facilitation session or workshop, including worksheets for advance instruction and health care power of attorney

### During the facilitation meeting or workshop:

- ✓ Use the Facilitator's Guide and copies of PAD forms to guide the interview
  - If possible, type the forms into a fillable form
- ✓ Encourage designation of a health care agent, and check to see if the person has talked to the selected person about being in this role
  - Questions to consider: is the HCA willing, capable, and available?
- ✓ Notarization—**REMEMBER THE PAD MUST BE SIGNED IN PRESENCE OF A NOTARY!**
  - Have the person sign PAD forms in presence of a notary and two witnesses
  - Witnesses must not be family members or treatment providers, to avoid conflicts of interest.
  - If not possible at the time of facilitation, help the person develop a plan to have the forms notarized in front of two witnesses, and follow up to make sure they get notarized
  - Follow up with the person to make sure they follow through with this plan

### After the facilitation meeting

- ✓ Assist the person with distributing the PAD, including the following:
  - Keeping at least one copy for themselves, stored in an accessible location
  - Health care facilities the person may go to IF the person has an active medical record
  - Behavioral health MCO, if the person is a member
  - The person(s) appointed as health care agent
  - Any other support people the person wants to give it to – could be family/friends/healthcare providers
- ✓ File a copy of the PAD with the Sec. of State website <https://www.sosnc.gov/ahcdr/>
  - To file: make a copy and mail to the Sec. of State, with the fee
  - This is optional, but a good storage option
  - The person will receive a wallet card with information how to access the online repository, and should keep the card in their wallet or purse
- ✓ Encourage the person to review and update the PAD if preferences change in the future. To update the PAD, the person would need to complete a new form, and withdraw old forms at the places the original form was filed