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Print Your Name

**Letter of Instruction To  
My Health Care Surrogate**

**INTENT**

In order to assist my Health Care Surrogate in making health care decisions for me as comfortably and confidently as possible, I leave these specific instructions to be incorporated by reference into the terms of my Health Care Surrogate Designation.

**DECISION MAKING**

\_\_\_\_\_ I do not wish the appointment of my Health Care Surrogate to be perceived as an expression of distrust or a lesser level of confidence in other family members. In fact, I hereby direct my Health Care Surrogate to consult, to the fullest extent possible, with all members of my immediate family regarding my health care decisions, particularly those concerning:

\_\_\_\_\_ An emergency health care situation.

\_\_\_\_\_ The withholding or withdrawal of treatment should I be in a terminal or irreversible condition.

\_\_\_\_\_ I urge my Health Care Surrogate to consult with the following individuals regarding termination of artificial life support treatments.

\_\_\_ Religious clergy: \_\_\_\_\_

\_\_\_ Medical professional: \_\_\_\_\_

\_\_\_ Trusted friend: \_\_\_\_\_

\_\_\_ Other: \_\_\_\_\_

\_\_\_\_\_ I have the following specific instructions for my Health Care Surrogate concerning the making of medical decisions on my behalf: \_\_\_\_\_

**MEDICAL RECORDS**

\_\_\_\_\_ I specifically authorize and direct my attending physicians, hospitals, or other health care providers to give my Health Care Surrogate the same access and same assistance in understanding my medical records as they would have given me.

\_\_\_\_\_ I authorize and encourage my Health Care Surrogate to take my medical records to another physician to get a second opinion before making a medical decision for me.

\_\_\_\_\_ I encourage my Health Care Surrogate to share the information in my medical records with the members of my immediate family.

\_\_\_\_\_ I am concerned about privacy. I direct my Health Care Surrogate not to show my medical records to other family members or third parties.

\_\_\_\_\_ I have the following specific instructions regarding the access and/or use of my medical records: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**CHOICE OF DOCTORS**

\_\_\_\_\_ I have placed complete trust in my Health Care Surrogate in both the hiring and termination of a physician. I ask my Health Care Surrogate to exercise the same diligence in this matter, as he or she would do for his or her own children, spouse, or other family members:

\_\_\_\_\_ I prefer my medical treatment continue with my primary care physician for as long as possible. I direct my Health Care Surrogate to maintain this relationship:

\_\_\_\_\_ Despite any future changes in my existing insurance coverage which might adversely impact me financially to continue such relationship.

\_\_\_\_\_ Unless a future change in my existing insurance coverage would adversely impact me financially to continue such relationship.

\_\_\_\_\_ If my primary care physician is unable to continue my medical treatment for any reason, I request my Health Care Surrogate to:

\_\_\_\_\_ Consult with my primary care physician to obtain a referral to a quality physician in the same locality, if possible.

\_\_\_\_\_ Consult with the following individual(s) regarding the selection of a physician for my medical care: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_ Select a physician affiliated with the following hospital or treatment facility:

\_\_\_\_\_

\_\_\_\_\_ I request that my Health Care Surrogate seek treatment for me, whenever economically feasible, with a specialist in the area of my medical condition.

\_\_\_\_\_ I have the following specific instructions regarding the selection of physicians for my medical care: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**HEALTH CARE FACILITY PREFERENCE**

*(Note: Some individuals may wish to rank their facility preferences by listing a number on the line to the right of the types of care facilities centered below)*

**HOME CARE \_\_\_\_\_**

\_\_\_\_\_ My preference is to remain in my home as long as economically and medically possible, and I direct my Health Care Surrogate to consult the Trustee of my Living Trust regarding the use of my trust assets to provide any necessary home remodeling, hiring of assisted living professionals and/or visiting medical professional.

\_\_\_\_\_ I direct my Health Care Surrogate and the Trustee of my Living Trust to take whatever measures necessary to allow for my in home health care needs, even if such directive should result in the depletion of all of my assets.

\_\_\_\_\_ Although my choice is to remain in my home, my overriding concern is to not burden my loved ones. As such, I direct my Health Care Surrogate to carefully consider the impact upon my loved ones when determining whether or not in home health care is in my best interest.

\_\_\_\_\_ I encourage my Health Care Surrogate to investigate and obtain home assistance services from any or all of the following organizations: Visiting Nurses Association, Home Hospice Healthcare, Meals-On-Wheels, and any other group which provides home-assistance services, including: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_ During any time when I need in home assistance, I request my Health Care Surrogate to determine if the following individual is able and willing to reside with me and provide the services necessary for me to remain in my home:

*(feel free to check off as options or rank them in order of preference)*

\_\_\_\_\_ Any family member.

\_\_\_\_\_ The following family member: \_\_\_\_\_

\_\_\_\_\_ The following friend: \_\_\_\_\_

\_\_\_\_\_ During any period of time when such family member / friend may reside with me to provide the necessary services for me to remain in my home, I direct my Health Care Surrogate to:

\_\_\_\_\_ Not charge this family member / friend room or board fees.

\_\_\_\_\_ Submit a reasonable compensation request to the Trustee of my Living Trust as a health care expense, upon the written request of this family member / friend.

\_\_\_\_\_ Visit my home, at least weekly / monthly / quarterly, to determine that the level of care I am receiving is appropriate.

**ALTERNATIVE HOME CARE \_\_\_\_\_**

\_\_\_\_\_ Should my Health Care Surrogate determine that continuing my health care in my home is no longer in my best interest (after considering the directives set forth above), I direct my Health Care Surrogate to consult with the Trustee of my Living Trust regarding the selling of my then current home and purchasing a more suitable residence in which my health care may still be administered in an “in home,” independent environment. When selecting a new home for me, I direct my Health Care Surrogate consider the following: *(feel free to check off as options or rank them in order of preference)*

\_\_\_\_\_ Proximity to family (specifically: \_\_\_\_\_)

\_\_\_\_\_ Proximity to friends (specifically: \_\_\_\_\_)

\_\_\_\_\_ Specific neighborhood / community: \_\_\_\_\_

\_\_\_\_\_ Other: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

**FAMILY MEMBER'S HOME CARE \_\_\_\_\_**

- \_\_\_\_\_ If my home cannot be used for any reason for home assistance services provided by an outside agency or a family member, I direct my Health Care Surrogate to determine if a family member is able and willing to take care of me in his or her home.
  
- \_\_\_\_\_ During any time when a family member provides home assistance services to me and I am residing in that family member's home, I direct my Health Care Surrogate to:
  - \_\_\_\_\_ Submit a reasonable compensation request to the Trustee of my Living Trust as a health care expense, upon the written request of this family member.
  
  - \_\_\_\_\_ Visit the home at least weekly / monthly / quarterly to determine that the level of care I am receiving is appropriate.
  
- \_\_\_\_\_ Despite the willingness of one of family members to have me live with him or her in their home, I do not want to be a burden to my loved ones, and I direct my Health Care Surrogate to kindly refuse on my behalf and to make alternative care arrangements.

**NURSING HOME/INSTITUTIONAL CARE \_\_\_\_\_**

- \_\_\_\_\_ When I can no longer maintain my independent lifestyle, with occasional care from family members or home-assistance agencies, I wish to move to a nursing care facility which can provide me with the appropriate level of care while maintaining the greatest degree of independence that my condition may allow.
  
- \_\_\_\_\_ During any time when my Health Care Surrogate believes that I can no longer receive appropriate care in my home or in a family member's home, I direct my Health Care Surrogate seek supporting certifications in writing from my primary care physician and an appropriate specialist recommended by my primary care physician and approved by my Health Care Surrogate. Upon receipt of these certifications, I authorize my Health Care Surrogate to select for me, and admit me into, a nursing care facility.
  
- \_\_\_\_\_ When selecting a nursing care facility, I direct my Health Care Surrogate to consider: *(feel free to check off as options or rank them in order of preference)*

\_\_\_\_\_ The following facilities: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_ A facility with the following qualities: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_ A facility located in the community where I live

\_\_\_\_\_ A facility located near my family (specifically: \_\_\_\_\_ )

\_\_\_\_\_ A facility operated in accordance with my religious beliefs

\_\_\_\_\_ A facility located near the following hospital or treatment center: \_\_\_\_\_

\_\_\_\_\_ When selecting a nursing care facility, I request that my Health Care Surrogate consult my family members to select a facility where my family members would feel comfortable visiting me.

\_\_\_\_\_ I qualify for admission to particular nursing care facilities because of my service as (veteran /clergy/other \_\_\_\_\_). I direct that my Health Care Surrogate consult the following benefit program when selecting a nursing care facility:

\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_ I direct that my Health Care Surrogate make at least two unannounced visits to any prospective nursing care facilities to determine if the services provided are acceptable.

\_\_\_\_\_ My Health Care Surrogate shall inspect the credentials and abilities of care givers, the variety and nutritional value of meals, the type and frequency of recreational activities, the cleanliness of the facility, the frequency of visitors to the facility, and any other services my Health Care Surrogate shall determine to be important to the selection of a quality nursing care facility.

\_\_\_\_\_ During any time when I live in a nursing care facility, I direct that my Health Care Surrogate visit me (weekly / monthly / other: \_\_\_\_\_) to determine that the level of care I am receiving is appropriate.

\_\_\_\_\_ During any period of time that I might still be able to interact with facility residents and participate in activities, I direct that my Health Care Surrogate consider the following nursing care facility or other similar facility: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_ During any period of time that I am unable to interact with facility residents and participate in activities, I direct that my Health Care Surrogate consider the following nursing care facility or other similar facility: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

**MEDICATIONS**

\_\_\_\_\_ I authorize my Health Care Surrogate to consent to medication to relieve my pain, if my primary care physician and any appropriate specialists agree that the pain medication would not complicate or worsen my condition.

\_\_\_\_\_ I desire that my Health Care Surrogate be very cautious when consenting to any addictive medications.

\_\_\_\_\_ I prefer the use of natural vitamin and nutrition treatment whenever potentially beneficial to my condition.

\_\_\_\_\_ I do not wish to participate in unconventional or experimental medication or therapy.

**OR**

\_\_\_\_\_ I authorize the use of unconventional or experimental medication or therapy, whenever possible.

\_\_\_\_\_ However, I am concerned about the high cost often associated with unconventional or experimental medication or therapy. I direct my Health Care Surrogate to balance the cost of the medication or therapy with the expected relief.

\_\_\_\_\_ I direct my Health Care Surrogate to consider any possible side effects associated with unconventional or experimental medication or therapy. I specifically do not want a "cure" that is worse than the original illness.

\_\_\_\_\_ I leave the following instructions regarding the use of medications: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**MEDICAL TESTS**

\_\_\_\_\_ I direct my Health Care Surrogate to not allow any tests to be performed on me, if after consultation with my attending physician and any appropriate specialists, the suggested test results are not reasonably certain to be beneficial in restoring my health.

\_\_\_\_\_ I encourage my Health Care Surrogate to get second opinions from appropriate specialists, if economically feasible, before authorizing or not authorizing any testing which my attending physician and/or primary care physician believe would be beneficial in restoring my health.

**MEDICAL HISTORY**

\_\_\_\_\_ I wish to inform my Health Care Surrogate of my tendency to have allergic or other adverse reactions to the following substances: \_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_ I wish to inform my Health Care Surrogate of the following family medical history: \_\_\_\_\_  
\_\_\_\_\_

**TERMINATION OF LIFE SUPPORT TREATMENT**

\_\_\_\_\_ In conjunction with the directions in my Living Will and Health Care Surrogate Designation, I direct my Health Care Surrogate to not allow any medical procedure that, in the opinion of my attending physician, is considered heroic or beyond those procedures usually performed for people in my condition.

\_\_\_\_\_ When my Health Care Surrogate has consulted with my attending physician, and any other physicians necessary, and the conclusion is that medical treatment is only artificially prolonging the dying process or that there is no reasonable chance of regaining consciousness, I direct my Health Care Surrogate to authorize my attending physician to enter a "no-code" or "do not resuscitate" order on my medical records. My Health Care Surrogate should never feel guilty about authorizing this course of action because this is the decision I would make if I were able to do so myself.

\_\_\_\_\_ I direct my Health Care Surrogate to hold a conference with all willing and interested members of my immediate family prior to making any decision regarding termination of artificial life support treatments.

\_\_\_\_\_ I direct that my Health Care Surrogate consider the following concerns prior to making any decisions regarding termination of artificial life support treatments: \_\_\_\_\_  
\_\_\_\_\_

**QUALITY OF LIFE**

\_\_\_\_\_ I consider the following activities/lifestyle opportunities to be essential for my quality of life, and I wish for my Health Care Surrogate and Trustee to make all reasonable action to assure I continue to have these basics (i.e. – access to outdoors, literature, spiritual support, music): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**HOSPICE CARE**

\_\_\_\_\_ I desire my Health Care Surrogate and Trustee to investigate and arrange for hospice care in the appropriate situation and direct them to consult with the following regarding such matters:

\_\_\_\_\_ My Primary Care Physician

\_\_\_\_\_ Other: \_\_\_\_\_  
\_\_\_\_\_

**ORGAN DONATION**

\_\_\_\_\_ I have left a directive regarding anatomical gifting in my estate-planning portfolio and direct my Health Care Surrogate to carry out this directive if at all possible under the circumstances.

\_\_\_\_\_ I have registered with “Donate Life Florida.org” regarding my anatomical gifting and direct my Health Care Surrogate to carry out this directive if at all possible under the circumstances.

I have consulted with legal counsel, am fully informed as to all the contents of this document, and understand the full import of the grant of these instructions to the person or persons named in my Health Care Surrogate Designation.

On this day, \_\_\_\_\_, 20\_\_\_\_\_, I sign this document and declare it to be my Letter of Instruction to My Health Care Surrogate.

\_\_\_\_\_  
SIGNATURE

This document was prepared by:  
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