

Immediate Help

1. Do I Have the Personal Information of the Person who Passed?

Record applicable information about the person who passed for easy reference when filling out any necessary forms:

PERSONAL INFORMATION

Name of Person Filling Out Form: _____

Date and Time of Drafting Form: _____

Name of Person who Died: _____

Date and Time of Death: _____

Date of Birth: _____

Place of Birth: _____

Social Security Number: _____

Service in the US Armed Forces, if applicable: _____

Marital Status: _____

Spouse's Name / Maiden Name: _____

Occupation and Type of Business: _____

Residence Address: _____

How Long He/She Resided in this County: _____

Names of Parents: Father's Name and Mother's Maiden Name: _____

Birth State and County of Father and Mother: _____

Level of Education: _____

Preferred Form of Disposition (if known): _____

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Place of Burial or Disposition: _____

Name, Address, and Phone Number of Certifying Physician: _____

Name, Address, and Phone Number of Person with Right to Control Disposition: _____

Note: Not all of the above information may be applicable to someone who has just passed; some will only be necessary if you are taking care of the death certificate yourself. However, you may find it useful to have all of the person's information in one place for reference throughout the process of after-death arrangements.

2. Who Will Make the Decisions?

Is there a Power of Attorney for Health Care? Yes No

Name of Power of Attorney for Health Care: _____

Contact information: _____

If there is not, list the Surviving Spouse and/or Legal Next of Kin:

1) Name: _____ Relationship: _____

Contact Information: _____

2) Name: _____ Relationship: _____

Contact Information: _____

3) Name: _____ Relationship: _____

Contact Information: _____

Note: If same-sex partners have not set up Power of Attorney for Health Care for each other, or are not state-registered domestic partners, then the next of kin of the person who died will have the legal right to make decisions, not the partner.

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3. What Important Documents Do I Need?

Check off the following documents as you locate them:

- Last Will and Testament
- Prepaid Disposition Plan
- Organ/Body Donor Registration Info

Check off the following documents as you or someone else completes them:

- Death Certificate
- Prepaid Disposition Plan
- Burial Transit Permit

Is there a prepaid disposition plan (a contract for a burial plot, cremation, disposition products, or services of a funeral provider)? Yes No

Is there a chosen services provider or funeral director? Yes No

Name of Services Provider or Funeral Director: _____

Contact information: _____

Have any of these disposition products been prepaid for:

- Burial Site
- Casket
- Urn
- Other (list): _____

Is there a Payable on Death Account or Totten Trust? Yes No

Is there a funeral or burial insurance policy? Yes No

Name of insurance policy provider : _____

Policy Number: _____

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List any additional disposition instructions that the person left behind: _____

COMPLETING THE DEATH CERTIFICATE

A funeral service provider will typically fill out the death certificate. Refer to the Personal Information portion of the checklist for help in filling it out if you have taken on this responsibility.

4. Which Family and Friends Do I Need to Contact?

Who needs to be notified immediately? If there is somebody who can help you in making some or all of the phone calls or after-death arrangements and preparations, put a note by their name.

Family to Notify (Spouse, Children, Parents, Siblings, Grandparents, etc.):

- 1) Name: _____ Contact: _____ Can Assist?: _____
- 2) Name: _____ Contact: _____ Can Assist?: _____
- 3) Name: _____ Contact: _____ Can Assist?: _____
- 4) Name: _____ Contact: _____ Can Assist?: _____
- 5) Name: _____ Contact: _____ Can Assist?: _____

Friends and/or Co-Workers to Notify:

- 1) Name: _____ Contact: _____ Can Assist?: _____
- 2) Name: _____ Contact: _____ Can Assist?: _____
- 3) Name: _____ Contact: _____ Can Assist?: _____
- 4) Name: _____ Contact: _____ Can Assist?: _____
- 5) Name: _____ Contact: _____ Can Assist?: _____

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Others to Notify or to Ask for Assistance:

- 1) Caregiver: _____ Contact: _____ Can Assist?: _____
- 2) Hospice Worker: _____ Contact: _____ Can Assist?: _____
- 3) Other(s): _____ Contact: _____ Can Assist?: _____

5. Are There Dependents That Need Immediate Consideration?

Is there somebody who can help you attend to those who need immediate assistance?

Name: _____ Contact: _____

List any dependents including children, a spouse, or elderly or disabled dependents.

- 1) Name: _____ Relationship: _____
Contact Information: _____
- 2) Name: _____ Relationship: _____
Contact Information: _____
- 3) Name: _____ Relationship: _____
Contact Information: _____
- 4) Name: _____ Relationship: _____
Contact Information: _____
- 5) Name: _____ Relationship: _____
Contact Information: _____

Do any of the dependents need temporary care or day care until permanent arrangements are made? Yes No

List needs: _____

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List any pets that need care:

- 1) Name: _____ Type: _____
- 2) Name: _____ Type: _____
- 3) Name: _____ Type: _____
- 4) Name: _____ Type: _____
- 5) Name: _____ Type: _____

List any special considerations: _____

6. Which Authorities Do I Need to Contact?

IF THE PERSON PASSED IN AN ASSISTED LIVING HOME, STATE FACILITY, OR HOSPICE

You will likely have to make arrangements to move the person who passed from the facilities within a day, as most assisted living communities do not have a morgue or storage facility.

- Call a local funeral service provider

IF THE PERSON PASSED AT HOME, WITH OR WITHOUT HOSPICE

- Call a local funeral service provider
- If you would like natural death care, call a home funeral consultant

7. What About DNA Sampling?

Did the person want a DNA sample recorded? Yes No Don't Know

If unknown, do you wish to have a DNA sample recorded? Yes No

- Select DNA sampling provider

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- Receive instructions on how to obtain and preserve a DNA sample (record below):

Name of DNA sampling company: _____

Contact information: _____

Record special instructions for obtaining and preserving a DNA sample: _____

8. What About Organ Donation?

Did the person leave wishes for organ donation? Yes No Don't Know

Did the person prearrange to donate specific organs for research or to a chosen organization?

Yes No

Name of Organization: _____

Contact information: _____

Notify organization/facility

If the person's wishes are unknown, check all of the following places for donor information:

- Driver's License
- Family Member
- Physician
- Organ Donor Consultant at Hospital
- Living Will
- Advance Directives

If the person did not specify wishes regarding donation, do I wish to make the decision to donate? Yes No

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Name of Donor Organization or Facility: _____

Contact information: _____

Did the person specify what he or she wanted to donate; or, if not, do you have a preference as to what to donate? (Check all that apply.)

Whole body to science

ORGANS

Heart

Kidneys

Liver

Lungs

Pancreas

Pancreas for islet cells

Small intestine

OTHER

Bones

Eyes / Corneas

Heart valves

Pericardium

Soft tissue (such as ligaments, tendons, blood vessels)

Skin grafts

Vertebral bodies

9. How Do I Transport the Person's Body or Cremated Ashes?

I am transporting:

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- Body
- Cremated Ashes

I am transporting:

- Between states
- From outside the U.S.

TRANSPORTING CREMATED ASHES BETWEEN STATES

Do you want to mail through the U.S. Postal Service? Yes No

Do you want to ship through an airline cargo service? Yes No

Name of Airline: _____

Contact information: _____

Do you want to carry the ashes with you on a flight? Yes No

Container I Will Use : _____

Do you want to transport via car or van? Yes No

Check state and local laws

Obtain Burial Transit Permit (if applicable)

TRANSPORTING BODY BETWEEN STATES

Do you want to work through your funeral director or service provider? Yes No

Do you want to ship through an airline cargo service? Yes No

Name of Airline: _____

Contact information: _____

Do you want to transport via car or van? Yes No

Check state and local laws

Arrange embalming in state of origin (if applicable)

Obtain Burial Transit Permit (if applicable)

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TRANSPORTING FROM OUTSIDE THE UNITED STATES

Notify U.S. embassy or consular official in country of death

Special disposition considerations in country of death: _____

Would you like to have the person cremated in the country of death? Yes No

Cost: _____

Contact U.S. Department of State or U.S. consular officer for proper documentation

If possible, would you like to have the body shipped back to the U.S.? Yes No

Contact U.S. Department of State or U.S. consular officer for proper documentation

Arrange with funeral director or service provider in U.S. to pick up body at airport

10. How Do I Place an Announcement or Obituary?

Do you want to place an announcement? Yes No

Which type(s) of announcement?

Print Obituary

Online Obituary

Letter

Email

If online or print obituary, what service or publication do you want to use?: _____

Contact information: _____

Is there someone who can help you prepare an announcement or obituary? Yes No

Name: _____ Contact: _____

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ANNOUNCEMENT OR OBITUARY CHECKLIST

- Select Photos or Images
- Purchase necessary cards or supplies
- Compile an email or address list

Write notes or draft your announcement or obituary: _____

11. Am I Taking Care of Myself?

Are you feeling physically, emotionally, and/or mentally exhausted? Yes No

It is not uncommon for family or friends who act as caregivers to experience adverse health effects during or after a prolonged period of caring for a terminally ill patient.

Were you a caregiver for your loved one before he or she passed? Yes No

Is it possible you are suffering from caregiver burnout? Yes No

Are you taking the time to look after yourself? Yes No

Are you taking the time to grieve as a family? Yes No

Note: See the Healing Process section of the checklist for more assistance with grief and healing.

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12. What Is Natural Death Care?

Do you want to keep the person at home for more time? Yes No

Do you want to have a home funeral? Yes No

Hire a home funeral consultant

Name of Home Funeral Consultant: _____

Contact information: _____

List any family and friends who can assist with natural death care:

1) Name: _____ Contact: _____

2) Name: _____ Contact: _____

3) Name: _____ Contact: _____

We hope this checklist has been helpful in addressing your after-death planning and healing needs. For more information on any other topics, consult our After Death Planning Guide on our website, or call us at (415) 431-3717, from 9:00AM-5:00PM PST or email: WeCare@SevenPonds.com.