



# Instruction Sheet for Personal Directives Form OPG5521

A personal directive is a legal document allowing you to name a person(s) you trust to make decisions on your behalf after you no longer have the capacity to make decisions.

Your personal directive needs to be written, dated, and signed by you and a witness to be legal.

These instructions help you write a personal directive using the Personal Directive form found at [formsmgmt.gov.ab.ca/Public/OPG5521.xdp](https://formsmgmt.gov.ab.ca/Public/OPG5521.xdp).

## You are the Maker

The first part of a personal directive is a statement saying you are making a personal directive. Clearly print your name so anyone who reads it knows who made the personal directive.

I, \_\_\_\_\_, make this Personal Directive.

(PRINT name of maker)

You are the maker of this personal directive and will be referred to as the maker for the rest of the form.

## Initial beside your item(s) to confirm your choice.

### 1. Revocation of Previous Directive (Required)

If you are writing a new personal directive to replace your current personal directive, initial the statement about revoking previous personal directives.

If you have never written a personal directive before, check 'Not Applicable'.

### 2. Designation of Agent (Required)

An agent is someone you name to make decisions for you when you no longer have the mental capacity to make these decisions.

You have three options:

- You can name one or more agent(s) and you choose the areas they will have authority. It is strongly recommended you pick someone you trust who will be able to carry out this role. Make sure your agent(s) is able and willing to act in this role. Look at your personal directive regularly to make sure your agent(s) continues to be able and willing to act in this role.
- You can name the Public Guardian as your agent if you do not have any other family or friends able and willing to act as your agent(s). The Public Guardian must agree to being designated as agent before being named. Contact the Public Guardian's office closest to you and ask about naming the Public Guardian as your agent.

Write your personal directive.

[www.alberta.ca/personal-directive.aspx](https://www.alberta.ca/personal-directive.aspx)

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- You can decide to not have an agent and your personal directive only would provide instructions to service provider(s).

### **3. Areas of Authority (Required)**

You can give your agent(s) decision-making authority for all personal matters like health care and accommodation after you no longer have mental capacity. You can also identify which personal matters are included and which agent(s) has authority over each matter. This allows you to be clear when different agents are named for different personal matters.

### **4. Designation of Agent for Temporary Care and Education of Minor Child(ren) (Optional)**

You can name an agent to make decisions for temporary care and education of your minor children. This agent might be different from the other agent(s) you have chosen and will continue to make decisions for your children until the court appoints a legal guardian of your minor children.

If you do not wish or need to, check 'Not Applicable'.

### **5. Specific Instructions (Optional)**

You can give specific instructions to your agent(s). This might include instructions on health care matters, like medical treatments. It is a good idea to talk about these instructions with your health care provider so they can give you accurate information.

You can provide instructions to service providers if you do not name an agent. It is important you talk about these instructions with health care providers to make sure your instructions follow your wishes.

If you do not want to provide any written instruction, check 'Not Applicable'.

### **6. Other Information (Optional)**

You can include information about your religious beliefs, cultural preferences or other things to guide your agent(s) in decision making.

If you have no information to add, check 'Not Applicable'.

### **7. Who Determines my Capacity (Optional)**

You can name a person you trust to assess your capacity in order to bring your personal directive into effect. This person should know you well, such as a close family member or friend. The person you name here would assess your capacity according to the Personal Directives Act Regulation after consulting with a physician or psychologist. A Declaration of Incapacity to Make Decisions about a Personal Matter (Schedule 2) found at [www.alberta.ca/assets/documents/opg-personal-directives-form.pdf](http://www.alberta.ca/assets/documents/opg-personal-directives-form.pdf) will need to be completed by the person you choose and the physician or psychologist to assess your capacity.

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If you do not name someone to assess your capacity, two service providers, one of whom must be a physician or psychologist, will assess your capacity.

If you have no information to add, check 'Not Applicable'.

## 8. Notification (Optional)

You can name someone in addition to your agent(s) to be notified when your personal directive is in effect.

If you do not wish to do this, check 'Not Applicable'.

## 9. Signatures (Required)

Your personal directive must be signed and dated in front of a witness. There are certain persons who cannot be a witness and they are listed on the form. Read the 'Notes' section on the form carefully.

## 10. Acknowledgement (Recommended)

The person(s) you name as agent(s) can acknowledge their future role. They will have the opportunity to read your personal directive to make sure they understand your wishes before having to make decisions. This also reassures health providers your agent(s) is aware they have been appointed.

## Safekeeping

Do not submit your personal directive to the court or the Office of the Public Guardian and Trustee (OPGT).

Keep your personal directive in a safe place with your other advance care planning documents, such as your enduring power of attorney and will.

Give a copy of your personal directive to your agent(s), your doctor and any other key people such as service providers.

## Register your personal directive

You can register your personal directive with the Government of Alberta so physicians can find out if you have a personal directive and how to contact your agents.

More information about the personal directive registry, including how to register your personal directive, can be found at [www.alberta.ca/personal-directive.aspx](http://www.alberta.ca/personal-directive.aspx).

If you have questions about personal directives after reviewing our website and publications available on our website, please email [personal.directives@gov.ab.ca](mailto:personal.directives@gov.ab.ca) or phone our toll free line at 1-877-427-4525.

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