

# Caregiver Document Readiness Guide

*(Client-ready version – clarity refinements and booking flow alignment)*

Forget-Me-Not Notary Services - Educational Guide – Not for Resale

# CAREGIVER DOCUMENT READINESS GUIDE

## Preparing Power of Attorney & Health Care Documents for Notarization

Mobile & Online Notary Appointments

### **Not legal advice:**

You are not expected to figure this out alone. This guide helps you prepare for notarization (ID, witnesses, and appointment readiness). It cannot advise you on what documents you need or what you should sign. For those questions, please contact the drafting attorney, your provider, or a care facility social worker.

Created by **Forget-Me-Not Notary Services**

Serving Alaska with calm, respectful notary care

# WELCOME

If you are reading this, you are likely helping someone you care about during a stressful or uncertain time.

This guide is designed to help you prepare documents calmly and correctly for notarization—without overwhelm, rushing, or guesswork.

You do not need to have everything perfect. You only need to take the **next right step**.

This guide focuses on **readiness and organization**, not legal advice. It helps your notary appointment go smoothly—whether mobile or online.

You are doing something important. We are here to support you.

**Important:** This guide does not provide legal advice and cannot tell you which documents you should sign. It is designed to help you prepare for notarization after an attorney, health care provider, or care facility has advised you on which documents are appropriate for your situation.

If you are unsure which documents you need, consider asking:

- An attorney
- A health care provider
- A hospital or care facility social worker

# Contents

HOW TO USE THIS GUIDE

QUICK START (24–48 HOUR VERSION)

Which document(s) do you currently have?

HOW TO CONFIRM REQUIREMENTS BEFORE BOOKING

If hospice or a provider told you “you need a Medical POA”

UNDERSTANDING COMMON DOCUMENTS (ORIENTATION ONLY)

DOCUMENT INVENTORY

IDENTIFICATION READINESS

SIGNER READINESS

WITNESS PLAN (ALASKA – GENERAL GUIDANCE)

WHAT CAUSES DELAYS OR RESCHEDULING

WHAT TO COMPLETE BEFORE THE NOTARY ARRIVES

PREPARING FOR A MOBILE NOTARY VISIT

PREPARING FOR REMOTE ONLINE NOTARIZATION (RON)

NOTARY APPOINTMENT SNAPSHOT

COPIES & DOCUMENT STORAGE PLAN

WHO TO NOTIFY AFTER SIGNING

NOTES & QUESTIONS

CAREGIVER GROUNDING PAGE

ABOUT FORGET-ME-NOT NOTARY

# HOW TO USE THIS GUIDE

This guide is not meant to be filled out all at once.

Use it as a working checklist to:

- Gather what is needed
- Identify what is missing
- Reduce last-minute stress
- Prevent appointment delays

If you are unsure about anything:

- Check the instructions on your document
- Confirm with the drafting attorney or provider
- Or ask us before your appointment

You are always welcome to ask readiness questions before scheduling.

# QUICK START (24–48 HOUR VERSION)

If your appointment is soon, start here.

- Identify which documents you have
- Confirm how many signers are involved
- Check if witnesses are required
- Gather valid ID for each signer
- Ensure the signer is willing and aware
- Prepare the signing location (or device)
- Do not sign anything yet**

Take a breath. One step at a time.

If you discover something missing, that's completely normal. Many caregivers gather these pieces step by step.

# Which document(s) do you currently have?

(Check what applies — it's okay if you're unsure.)

- Financial Power of Attorney (POA)
- Health Care POA / Medical POA
- Advance Health Care Directive / Advance Directive
- HIPAA release (if included)
- Will or Trust (may or may not need notarization)

If you're not sure, look at the **title page or instructions page** of your document.

# HOW TO CONFIRM REQUIREMENTS BEFORE BOOKING

Preferred contact (for fastest confirmation):

Email a photo of the **title page or instructions page** to:

cherissa@forgetmenotnotary.com

If email is not possible, you can text it to:

907-671-0087

If you're not sure whether your documents require a notary, you're welcome to ask before scheduling.

Quick questions are always welcome—especially when caring for a loved one.

If you are not comfortable sending sensitive documents by text, the **instructions page is usually enough** for us to confirm notarization and witness requirements.

Once you feel ready to proceed, you may:

- Schedule directly online
- Or message us to arrange a time

If you're unsure whether your documents are ready, you're welcome to text or email a photo of the instructions page and we can confirm before you schedule.

Start here to choose the best next step or schedule an appointment:

<https://www.forgetmenotnotary.com/start-here>

# If hospice or a provider told you “you need a Medical POA”

You do not need to schedule until you feel clear on the document requirements.

This section helps you ask the right questions first.

1. Ask the provider which form they want to use (their form, an attorney’s form, or a state form)
2. Ask whether the form requires notarization or witnesses (the form will usually say)
3. Confirm who the signer is and whether they can communicate and consent today
4. Gather the signer’s valid ID
5. If witnesses are required, line them up now (adults, impartial — see witness notes below)
6. Contact us with:
  - your city
  - preferred appointment type (mobile or online)
  - a photo of the instructions page if available
7. Once everything looks ready, schedule your appointment.

# UNDERSTANDING COMMON DOCUMENTS

*(Orientation only)*

This section explains common document types at a high level. It does not recommend what you should sign.

<b>Document</b>	<b>What it generally does</b>	<b>When people hear about it</b>
Financial POA	Lets someone manage financial or legal matters	Banking, bills, benefits
Health Care / Medical POA	Names a medical decision-maker	Hospital or hospice
Advance Directive	Often includes care wishes + decision-maker	Care planning

Your **specific form controls**. Ask an attorney or provider if unsure.

# DOCUMENT INVENTORY

Use this page to track what exists and what still needs attention.

Document Type: \_\_\_\_\_

Drafted By: \_\_\_\_\_

## # of Signers:

---

Needs Notary?

Yes  No  Unsure

Witnesses?

Yes  No  Unsure

Signed Yet?

Yes  No  Unsure

# IDENTIFICATION READINESS

Each signer must present **valid government-issued ID**.

- Driver's License
- State ID
- Passport
- Other (confirm acceptability)

ID must be **current or acceptable under notary standards**.

Only people who are signing or witnessing need to present ID.

Forget-Me-Not Notary Services - Educational Guide - Not for Resale

# SIGNER READINESS

The signer must be:

- Willing to sign
- Aware of what they are signing
- Able to communicate during the appointment

Notes or concerns: \_\_\_\_\_

If cognition, medication, or fatigue may be a concern, consider scheduling the appointment during a time of day when the signer is **most alert and comfortable**.

# WITNESS PLAN (ALASKA – GENERAL GUIDANCE)

Witness requirements are **document-specific**.

Your form will state whether witnesses are:

- required
- optional
- not needed

We can confirm what your form asks for, but **we cannot advise what you should choose**.

General guidance:

- Bring witnesses only if your form requires them
- Witnesses should be adults and impartial
- Witnesses are separate from the notary
- The notary does not provide witnesses

Some health care documents may allow either:

- notarization  
or
- two adult witnesses

Your form will specify.

If you are unsure, send us a photo of the **instructions page before booking**.

# WHAT CAUSES DELAYS OR RESCHEDULING

- Signer not present or unavailable
- Required witnesses not present
- ID missing or expired
- Signer unable to communicate
- Document incomplete
- Document signed before the notary instructs the signer to sign
- Incorrect appointment type booked

Forget-Me-Not Notary Services - Educational Guide – Not for Resale

# WHAT TO COMPLETE BEFORE THE NOTARY ARRIVES

- All information completed except **signatures and the notarial section**
- Names, addresses, dates filled in clearly
- No blanks left unless allowed by the form
- Documents printed (for mobile appointments)

**Do not sign until the notary instructs you to do so.**

Forget-Me-Not Notary Services - Educational Guide – Not for Resale

# PREPARING FOR A MOBILE NOTARY VISIT

- Quiet, comfortable space
- Table or firm surface
- Adequate lighting
- All signers and witnesses present
- Pets secured if needed
- Breaks planned if the signer tires easily

Forget-Me-Not Notary Services - Educational Guide - Not for Resale

# PREPARING FOR REMOTE ONLINE NOTARIZATION (RON)

- Device with camera and microphone
- Stable internet connection
- Government-issued ID ready
- Quiet, private space
- Email access available
- Ability to open a link during the session

The signer must be visible on camera and able to complete the identity-verification prompts required by the platform.

Watch a typical RON session example:

[https://www.youtube.com/watch?v=\\_NIjgS8iq4](https://www.youtube.com/watch?v=_NIjgS8iq4)

If you get stuck at any step, we will guide you during your appointment.

# NOTARY APPOINTMENT SNAPSHOT

Appointment date/time: \_\_\_\_\_

Best contact number: \_\_\_\_\_

Appointment type:

Mobile

Online

Documents: \_\_\_\_\_

Number of signers: \_\_\_\_\_

Witnesses required?

Yes  No  Unsure

ID type: \_\_\_\_\_

# COPIES & DOCUMENT STORAGE PLAN

Who receives copies?

- Signer
- Agent
- Attorney
- Health care provider
- Other \_\_\_\_\_

Where originals will be stored:

---

# WHO TO NOTIFY AFTER SIGNING

After signing, notify the people or organizations that need a copy.

- Attorney
- Doctor / clinic
- Care facility
- Family member
- Other \_\_\_\_\_

Forget-Me-Not Notary Services - Educational Guide – Not for Resale

# NOTES & QUESTIONS

Questions to ask an attorney or provider:

- Do these forms require witnesses or notarization?
- When does the document take effect?
- Should a HIPAA release be included?
- Who should receive copies?

Additional notes:

---

# CAREGIVER GROUNDING PAGE

Before you close this guide:

Take three slow breaths.

You are doing the right next step.

You do not have to do everything today.

Progress is enough.

Forget-Me-Not Notary Services - Educational Guide – Not for Resale

# ABOUT FORGET-ME-NOT NOTARY

Forget-Me-Not Notary Services

Phone: 907-671-0087

Email:  
cherissa@forgetmenotnotary.com

Website:  
<https://www.forgetmenotnotary.com>

Start here to choose the best next step:

<https://www.forgetmenotnotary.com/start-here>

For professionals supporting families (social workers, hospice teams, care coordinators):

You are welcome to share this guide with families who need help preparing documents for notarization.

Notes:

---

---

---

---