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How to Complete Your College Student Legal Documents

A plain-language, step-by-step guide for New York families

You do not need to be a lawyer to complete these forms. Below is exactly what to fill in, what to check or initial, and what to leave blank on each one. Take them one at a time — most take about five minutes. The Power of Attorney has the most choices, so we walk through it line by line.

Remember the roles: the student (the adult, age 18 or older) is the person signing every form. A parent or other trusted adult is the person being named to help. The student is always in control and can revoke any of these later.

A few rules that apply to every form

- The student signs each form. Print clearly in ink, complete every blank that applies, and write "N/A" where something does not apply.
- Sign each document separately. Do not staple them into one packet for signing — the Health Care Proxy and the Power of Attorney are separate legal instruments.
- Witnesses and notary: the Health Care Proxy needs two adult witnesses (no notary). The Power of Attorney needs a notary and two witnesses. The person named as agent can never be a witness. A bank will usually notarize for free.
- Keep the signed originals in a safe place, give the student copies, and save PDFs on everyone's phone. File the health forms with the campus health center.

Form 1 — New York Health Care Proxy

What it does: lets the person you name (the "agent") make medical decisions for the student — but only if and when a doctor determines the student cannot make decisions themselves.

What to fill in

- Principal: the student's name.

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- Agent's name, home address, and telephone: the trusted adult (for example, a parent).
- Alternate agent: recommended — name a backup (for example, the other parent) in case the first agent is unavailable.
- Signature, address, and date: the student signs and dates.
- Witnesses: two adults sign. Neither the agent nor the alternate agent may be a witness.

What to leave blank

- **LEAVE BLANK** The "instructions, wishes, or limits" section is optional. One important exception: if the student wants the agent to be able to decide about artificial nutrition and hydration (a feeding tube or IV fluids), say so here or discuss it clearly — otherwise the agent will not have authority over that one issue.
- **LEAVE BLANK** The expiration line. Leave it blank so the proxy stays in effect indefinitely. Only fill it in if you want the proxy to end on a certain date or event.

Form 2 — Authorization to Share and Discuss Health Information

What it does: lets doctors share medical information with, and talk to, the family member you name. It does not let that person make decisions — that is the Health Care Proxy's job.

What to fill in

- Section 1 — the student's name, date of birth, address, and phone or email.
- **CHECK** Section 2 — check the first box ("Any health care provider…") for the simplest, broadest coverage. Only use the second box if you want to limit it to specific named providers.
- **CHECK** Section 3 — the recipient (the parent): name, relationship, address, phone, and email.
- **CHECK** Section 4 — check the categories of information to share. For most families, either check the boxes that apply (condition/diagnosis; medications/allergies; labs/imaging/referrals; billing/insurance) or simply check "Entire medical record, except the excluded categories."

- **REQUIRED** Section 5 — Expiration: you MUST give an expiration date or event (for example, a specific date, or "upon graduation"). The form is not valid without one — do not leave this blank. Also check "At my request" for the purpose.
- Signature and date: the student signs.

What to leave blank

- **LEAVE BLANK** The excluded-categories paragraph in Section 5 is informational — nothing to check. (Psychotherapy notes, substance-use, HIV, and school records are automatically excluded; if you ever need those, a separate provider-specific form is required.)
- **LEAVE BLANK** The "Other" lines, unless something specific applies.

Form 3 — New York Statutory Short Form Power of Attorney

What it does: covers financial and legal matters only — not medical decisions. It is "durable" (it keeps working if the student becomes incapacitated), and once the agent signs before a notary it can be used right away. Because it grants real authority over money, complete it thoughtfully.

Work through it section by section:

(b) Designation of Agent

- The student is the "principal" — enter the student's name and address, then the agent's name and address (for example, a parent).
- **INITIAL** If you name two agents (for example, both parents), initial "My agents may act SEPARATELY" so either one can act alone. If you leave it blank, they must act together on everything.

(c) Successor Agent (optional)

- Recommended: name a backup agent (for example, the other parent) who steps in only if the first agent cannot serve. Leave the "specific succession provisions" lines blank.

(d) and (e)

- **LEAVE AS PRINTED** Nothing to fill in. These keep the document durable and state that it does not revoke earlier powers of attorney.

(f) Grant of Authority — the checkboxes (the important part)

Initial only the subjects you actually want the agent to handle. For a typical college student whose parent will help with money and school, here is a sensible starting point:

Recommended to initial for most families:

- (D) banking transactions — pay bills and manage the student's checking/savings.
- (F) insurance transactions — handle health, auto, or renter's insurance.
- (I) personal and family maintenance — day-to-day expenses such as rent, tuition, and living costs. (Note: this also lets the agent make the small, customary gifts the student already makes, capped at $5,000 total per year.)
- (K) financial matters related to health care; records, reports, and statements — handle medical bills and insurance paperwork.
- (M) tax matters — file or handle the student's taxes.

Initial only if it applies to your student:

- (A) real estate transactions — only if you may need to sign or handle an off-campus apartment lease in the student's name.
- (C) bond, share, and commodity transactions — only if the student has a brokerage or investment account.
- (H) claims and litigation — only if you may need to handle a legal claim for them (for example, after a car accident).
- (L) retirement benefit transactions — only if the student has a retirement account from a job.

Usually leave blank:

- (B) chattel and goods, (E) business operating, (G) estate transactions, and (J) government benefits — not typically needed for a college student.
- (N) all other matters — a broad catch-all; leave it blank unless you specifically intend to grant everything.

- (O) delegation — leave blank; this would let your agent hand these powers to someone else.
- (P) — this is an alternative shortcut. Instead of initialing each line, you may write the letters you want (for example, “D, F, I, K, M”) on the (P) line and initial (P). Most people find it easier to just initial the specific lines above and leave (P) blank.

(g) Certain Gift Transactions (optional)

- **LEAVE BLANK** Leave this blank unless you are working with a lawyer to allow gifts larger than $5,000 — this can significantly change the student’s property and how it passes.

(h) Modifications · (i) Monitor (optional)

- **LEAVE BLANK** Leave Modifications blank for standard use. Under Monitor, you may optionally name someone who can request records of what the agent does — otherwise leave it blank.

(j), (k), (l)

- **LEAVE AS PRINTED** Informational only — nothing to complete.

(m) Signature and Acknowledgment

- **SIGN + NOTARY** The student signs and dates in front of a notary public.

(n) Signatures of Witnesses

- **TWO WITNESSES** Two witnesses sign. They cannot be the agent, the successor agent, or anyone who could receive gifts. In New York the notary may serve as one of the two witnesses.

(o) Important Information for the Agent

- **READ ONLY** Informational — nothing to complete. It explains the agent’s legal duties.

(p) Agent’s Signature · (q) Successor Agent’s Signature

- **AGENT SIGNS + NOTARY** Each agent (for example, a parent) reads the form and signs before a notary. The agent cannot use the Power of Attorney until this is signed. The successor agent signs at (q) only if and when they step in.

Form 4 — FERPA Consent and Campus Access Checklist

What it does: lets the college share school records (grades, financial aid, the tuition bill, and more) with the person you name. The school may still require its own form or portal designation.

What to fill in

- Student and institution: the student's full name, student ID number, college or university, and program or campus.
- **CHECK** Records that may be disclosed: check the categories you want shared — academic (grades/transcript), financial-aid, student-account (tuition/balance), housing, and disciplinary (only if the student chooses). Check what applies.
- **CHECK** Recipient and purpose: the parent's name, relationship, and contact information; check "Assist with… at my request."
- **CHECK** Duration: check either "remains effective until I revoke it" or set an expiration date/event.
- Signature and date: the student signs.

The campus access checklist at the end

This part is a to-do list, not blanks to fill. Work through each item with the school: confirm the FERPA portal designation, set up authorized-payer/bursar access separately, verify emergency contacts, ask whether the campus health or counseling center needs its own HIPAA or consent form, carry current insurance and pharmacy cards, and submit any disability-services releases.

If you get stuck

These forms are meant to be simple, but the Power of Attorney in particular can raise questions specific to your family. If anything is unclear, our office is glad to help — the consultation is complimentary.

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This guide provides general information about New York forms and is not legal advice; it does not create an attorney-client relationship, and it may not be valid or sufficient in another state. Laws and school policies can change. Consult current official sources and, where appropriate, a lawyer licensed in the relevant state.