Patient File Checklist

The single most important thing you can do to promote clear communication and function effectively as a caregiver is to create and maintain a comprehensive file of information about the person you are caring for. You can keep this information in any form that works for you, although most people just put it in a file folder with the care recipient's name on it. Others use binders or other types of organizational tools. It doesn't have to be pretty, it just has to work for you. Here are three tips to help make that happen:

1. **Select a place to store the file that is logical to you** – where you can grab it quickly in an emergency or on your way out the door to an appointment.
2. Once you have decided where to keep the file, **keep it in the same place**.
3. **Keep it up to date.** An outdated file won't do you much good when you're standing in the emergency room at midnight!

What Should Go in the Folder

Begin by filling out the Personal Medical Record that is included in your handouts. Then, using the list below as a guide, check off each item as you add it to the file. File this checklist with the information you've gathered.

- Patient's personal and medical data (Personal Medical Record)
- Insurance information
  - Medicare/Medicaid
  - Private medical insurance
  - Long-term care insurance
  - Prescription drug insurance
  - Dental insurance
  - Vision insurance
  - Other insurance policies
- Legal information and documents
  - Living will
  - Durable Power of Attorney for Health Care (or Health Care Proxy)
  - Power of Attorney for finances
  - Pre-arranged funeral plan
  - Name and contact information of care recipient's lawyer
  - Contact information for relatives and close friends to be immediately notified in case of severe illness or death
  - Other legal documents
- Other legal or important documents (specify below)