Special Care Organizational Record for Elderly Family Members

















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Introduction

The Special Care Organizational Record for Elderly Family Members (SCOR) is designed to facilitate the care of the older members of your family. It provides a central location for keeping track of your relative's records and other pertinent information. This is particularly helpful if someone else needs to provide care for your family member if you are away or unable to provide care. The SCOR also provides a care guide section that can provide a wealth of detailed information to a new caregiver on topics such as daily routine, diet, and preferred leisure activities.

To maximize the benefits of the SCOR, incorporate other pieces of health-related information, such as information from doctors or even articles that you feel are valuable. The SCOR can also be taken to doctor's appointments to keep track of pertinent information and manage health appointments.

The SCOR is available in Adobe Acrobat format, allowing you to type information directly into the forms. If you do not have your information readily available, save the SCOR and update it later or print the forms you need and fill them out by hand.

Please keep in mind that the SCOR is not intended to take the place of official medical records, or is it a legally binding document. It contains private information such as social security numbers, medical histories, and insurance information. To maintain your family's privacy, keep your SCOR in a safe, secure place.

If you have any questions or comments about the SCOR, please submit them through the MilitaryHOMEFRONT Feedback link located on the upper right corner of the MilitaryHOMEFRONT website home page at www.militaryhomefront.dod.mil.

Medical Records Organizer for Elderly Family Members

What is the SCOR for Elderly Family Members?

The SCOR for Elderly Family Members is a tool to help families organize and keep track of medical records and related information for an elderly family member in the event that care must be provided by someone outside the family.

How can the SCOR for Elderly Family Members help you?

In the process of caring for your elderly family member, it can be challenging to keep track of rapidly changing health or medical issues. The SCOR will help you organize this information for quick access. It will also allow you to share key information with those who provide care for your family member.

Use the SCOR for Elderly Family Members to

- track changes in your family member's medicines or treatments;
- list telephone numbers for health care providers and community organizations;
- prepare for appointments;
- file information about your family member's health history; and
- share new information with your family member's primary doctors and other care providers.

Some helpful hints for using your family member's SCOR for Elderly **Family Members:**

- Keep the SCOR where it is easy to find so it will always be on hand when you need it.
- Be mindful that the SCOR contains private information and should be kept in a safe place.
- Keep the SCOR as up-to-date as possible. Add new information to the SCOR whenever there is a change in your family member's treatment.
- Bring the SCOR with you to appointments and hospital visits so that the information you need will be close at hand.

SCOR for Elderly Family Members (continued)

How do you set up your family member's SCOR? Follow these steps:

STEP 1: Gather information you already have.

Gather any health information that you have about your family member. This may include reports from recent doctor's visits, immunization records, a summary of a recent hospital stay, test results or informational pamphlets, etc.

STEP 2: Look through the pages of the SCOR.

Select the pages that you think will be most beneficial for tracking your family member's health and care. Once you have determined what you need, print out those selected pages.

STEP 3: Decide which information is most important to keep in the SCOR.

What information do you find yourself looking for often? What information do the care providers need when caring for your family member? Include frequently referenced and important information in your portable SCOR and store additional, less critical information in a file drawer or box where you can find it if needed.

STEP 4: Put the SCOR together.

Organize the SCOR in a way that makes the most sense for you and your family member. Here are some supplies that may help:

- 3-ring binder or large accordion envelope to hold papers securely
- Tabbed dividers for creating separate sections
- Pocket dividers for storing reports
- Plastic pages for storing business cards and photographs

Things to remember about the SCOR:

- While the SCOR does contain a lot of your family member's medical history/information, it is not intended to replace official medical records.
- The SCOR is not legally binding in any way. It is intended to provide a place to start thinking about the care your family member would receive if you were no longer able to provide it. Please keep in mind proper legal protocol prior to making legally binding decisions.
- It contains very private information (e.g., social security numbers, insurance information, medical history). It is imperative that you keep it in a safe place.

■ Personal Information

Personal Information

Name:				
Date of Birth:		SSN:		Blood Type:
Address:				
Phone:	Fax:		County:	
Emergency Contact:				
Relationship:	Emergency C	ontact Numbe	r:	
Emergency Contact:				
Relationship:	Emergency C	ontact Numbe	r:	
Emergency Contact:				
Relationship:	Emergency C	ontact Numbe	r:	
Notes (allergies, medications, etc.	.):			

Personal Information: Spouse Information

Name:	
Address:	
Phone:	Dates of Marriage:
Personal Information: Previous	ous Spouse Information
Name:	
Address:	
Phone:	Dates of Marriage:

Personal Information: Children's Contact Information

Name:		
Address:		
Phone:	Date of Birth:	Child's Spouse:
Name:		
Address:		
Phone:	Date of Birth:	Child's Spouse:
Name:		
Name: Address:		
	Date of Birth:	Child's Spouse:
Address:	Date of Birth:	Child's Spouse:
Address: Phone:	Date of Birth:	Child's Spouse:

Personal Information: Parent's Contact Information

Mother's Name:		
Address:		
Phone:	Date of Birth:	Date of Death:
Burial Site:		
Father's Name:		
Father's Name: Address:		
	Date of Birth:	Date of Death:

Personal Information: Sibling's Contact Information

Sibling's Name:		
Address:		
Phone:	Date of Birth:	Sibling's Spouse:
Sibling's Name:		
Address:		
Phone:	Date of Birth:	Sibling's Spouse:
,		
Sibling's Name:		
Sibling's Name: Address:		
	Date of Birth:	Sibling's Spouse:
Address:	Date of Birth:	Sibling's Spouse:
Address: Phone:	Date of Birth:	Sibling's Spouse:

Personal Information: Pet Information

Name:	Age:
Veterinarian:	Phone:
Address:	
Medical Conditions (allergies, medications, etc.):	
Special Instructions (food, daily care, etc.):	
Name:	Age:
Name: Veterinarian:	Age: Phone:
Veterinarian:	

Personal Information: Military Service Information

Branch:
Last Rank Held:
Dates of Service:
Location of Discharge Paperwork (DD214):

Personal Information: Employment Information

Name:	
Address:	
Phone:	Employment Dates:
Starting Salary:	Ending Salary:
Pensions, Life Insurance, Disability Location of Pension or Benefits Doc	Insurance, Health Care Insurance or other Benefits: cuments:
Name:	
Name: Address:	
	Employment Dates:
Address:	Employment Dates: Ending Salary:

Personal Information: Important Dates to Remember (Birthdays, Anniversaries, Graduations, etc.)

Date:		
Event:		
Notes:		
Date:		
Event:		
Notes:		
Date:		
Date:		
Event:		
Event:		
Event:		
Event: Notes:		
Event: Notes: Date:		

■ In Case of an Emergency

Contact Information

The Person You Have Appointed To Make Decisions On Your Behalf

Address:	
Email:	
All Telephon	ie Numbers:
Alternate Per	son's Contact Information (if applicable)
	and contact information (if applicable)
Name:	son's contact information (if applicable)
Name:	

In Case of an Emergency: Emergency Plan

Use the tables below to list any health-related or other emergencies that may occur and how the emergency should be handled (e.g., if your family member is epileptic and has a seizure or your family member becomes combative under certain circumstances).

/hat Might Happen:
/hat To Do:
tep 1:
tep 2:
tep 3:
tep 4:
ther:
/hat Might Happen:
/hat Might Happen: /hat To Do:
/hat To Do:
/hat To Do: tep 1:
/hat To Do: tep 1: tep 2:

■ Medical Health

Health Insurance — TRICARE

Use this link to find a local TRICARE Service Center (TSC):

www.tricare.mil/contactus

TRICARE Regional Office (TRO):				
Address:				
City:	State:	Zip:		
Phone:	Email:			
TRICARE Service Center:				
Address:				
City:	State:	Zip:		
Phone:	Email:			
Beneficiary Counseling and Assistance Coordinator (BCAC):				
Beneficiary Counseling and As	ssistance Coordinator (BCAC):			
Beneficiary Counseling and As	ssistance Coordinator (BCAC):			
	ssistance Coordinator (BCAC): State:	Zip:		
Address:		Zip:		
Address: City:	State: Email:	Zip:		
Address: City: Phone:	State: Email:	Zip:		
Address: City: Phone: Debt Collections Assistance C	State: Email:	Zip:		

Medical Health: Additional Insurance

Name of Other Insurance:					
Policy Number:					
Contact Person:					
Address:					
Email:	Phone:	Fax:			
Case Manager:					
Email:	Phone:	Fax:			
Name of Other Insurance:					
Policy Number:					
Contact Person:					
Address:					
Email:	Email: Phone: Fax:				
Case Manager:					
Email:	Phone:	Fax:			
Name of Other Insurance:					
Policy Number:					
Contact Person:	Contact Person:				
Address:					
Email:	Phone:	Fax:			
Case Manager:					
Email:	Phone:	Fax:			

Medical Health: Additional Insurance (continued)

Email:

Medicare Policy Number: Contact Person: Address: Email: Phone: Fax: Case Manager: Phone: Email: Fax: Medicaid Policy Number: Contact Person: Address: Email: Phone: Fax: Case Manager: Phone: Email: Fax: Medigap (carrier) Policy Number: Contact Person: Address: Email: Phone: Fax: Case Manager:

Phone:

Fax:

Medical Health: Additional Insurance (continued)

Long Term Care Insurance (carrier)

Policy Number:				
Contact Person:				
Address:				
Email:	Phone:	Fax:		
Case Manager:				
Email:	Phone:	Fax:		

Medical Health: Medical Bill Tracker

Date	Provider	Amount Billed	Amount Allowed	Amount Paid	Paid by Health Insurance	Family Owes	Debt Paid

Medical Health: Current Medical Diagnoses

Date	Diagnosis	Notes

Medical Health: Current Medication

Start Date	Stop Date	Medication (brand/generic)	Prescribed by	Dose/ Route	Time Given	Reason for Medication	Special Care Instructions

Medical Health: Significant Illnesses

Date	Illness	Notes

Medical Health: Surgical Procedures

Date	Surgical Procedures	Procedure/ Treatment plan	Notes

Medical Health: Allergies (e.g., food, medications, materials)

Allergen	Allergic Reaction	How to Respond

Medical Health: Care Providers

Primary Care Manager (PCM):					
Military Treatment Facility (MTF):					
Address:	Address:				
Email:	Phone:	Fax:			
Civilian Hospital:					
Address:					
Email:	Phone:	Fax:			
Dentist:					
Address:					
Email:	Phone:	Fax:			
Specialist and Specialty:					
Address:					
Email:	Phone:	Date of first visit:			
Specialist and Specialty:					
Address:					
Email:	Phone:	Date of first visit:			

Medical Health: Care Providers (continued)

Nutritionist:				
Address:				
Email:	Phone:	Date of first visit:		
Social Worker:				
Address:				
Email:	Phone:	Date of first visit:		
Physical Therapist:				
Address:				
Email:	Phone:	Date of first visit:		
Speech Therapist:				
Address:				
Email:	Phone:	Date of first visit:		
Occupational Therapist:				
Address:				
Email:	Phone:	Date of first visit:		

Medical Health: Care Providers (continued)

Therapy:	Therapist:				
Address:					
Email:	Phone: Frequency:				
Therapy:	Therapist:				
Address:					
Email:	Phone:			Frequency:	
Nursing Agency:	Contact Person:				
Address:					
Email:	Phone: Date of first visit:				
# of hours approved:	Day: Night: Weekend:			Weekend:	
Case Manager:					
Address:					
Email:	Phone: Date of first visit:				
Note: Please attach the plan of care provided by the Case Manager.					
Additional notes:					

Medical Health: Doctor Visits

Medical Health: Appointment Log

Date	Provider	Reason Seen/Care Provided	Next Appointment

Medical Health: Health Screening and Tests

Date	Health Screening/Test	Results

Medical Health: Hospital Tracker

Date	Hospital	Reason for Admission	Notes

Medical Health: Family Medical History

Check the box if one or more family members have had one of these health conditions and note how they are related.

Condition	Relative	Condition	Relative
☐ Cardiac		☐ Diabetes	
☐ Hypertension		□ Blood	
Renal		☐ Ear	
☐ Tuberculosis		☐ Thyroid	
☐ Gastro-intestinal		☐ Vision	
☐ Cancer		☐ Psychological	
☐ Allergy		☐ Auto Immune	
☐ Orthopedic			
☐ Lung			

Additional family information:

Name	Date of Birth	Health
Mother:		
Father:		
Sibling:		

Medical Health: Family Medical History List any other health conditions in your family member's history not listed above and the person's relationship to your family member.

Medical Health: Lifestyle Habits

In this section, list any notes regarding your family member's lifestyle habits using the questions below to guide you.

Diet: a. What does your family member typically eat for each meal?		
b. Does he or she eat meals at consistent times throughout the week?		
c. Does he or she snack between meals? If so, how often and what does he or she eat for snacks?		
Exercise: a. Has your family member ever exercised?		
b. When, for how long, and how often?		
c. Does your family member currently exercise?		
d. How long and how often?		

■ Care Guide

Medical Health: Lifestyle Habits (continued)

Sleep Habits:
a. How many hours per night does your family member typically sleep?
b. Does your family member regularly have trouble falling asleep or staying asleep?
Stress:
a. Does your family member often feel stressed or under pressure?
b. How often?
Smoking:
a. Has your family member ever smoked?
b. When and how often?
c. Does your family member currently smoke?
d. How often?
Alcohol Consumption:
a. Has your family member previously consumed alcohol?
b. When and how often approximately?
c. Does your family member currently drink alcohol?
d. How often?
e. Does your family member drink socially or when alone?

Care Guide: Daily Routine

Provide a description of your family member's typical day/daily routine. Include information such as when he or she wakes up, eats meals, takes medications, exercises, visits with friends, etc.:

Day	Routine
Sunday	
Monday	
Tuesday	
Wednesday	
Thursday	
Friday	
Saturday	

Care Guide: Personal Care
List tasks that your family member is able to do independently (e.g., eating, bathing, toileting, dressing, moving):
List tasks for which your family member requires assistance (e.g., eating, bathing, toileting, dressing, moving):
List other information related to personal care that would be helpful to those providing care for your family member:

Care Guide: Food and Eating

List foods that your family member particularly enjoys and or dislikes:

Likes	Dislikes

Typical daily diet:

Meal	Preferred Foods/Drinks
Breakfast	
Lunch	
Dinner	
Snack	

Care Guide: Food and Eating (continued)

Favorite restaurants and preferred meals:

Restaurant	Preferred Meals

Care Guide: Diet Tracking Form

Copy this form and use it to track your family member's diet on a weekly basis.

Week of:				Weight:			
Date Check	æd:						
	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
6am							
7am							
8am							
9am							
10am							
11am							
12pm							
1pm							
2pm							
3pm							
4pm							
5pm							
6pm							
7pm							
8pm							

Care Guide: Other Likes and Dislikes

To provide additional helpful information to your caregiver, list any of your family member's specific likes or dislikes (e.g., enjoys spending some time outside each day, dislikes certain television programs or books, likes to be read to):

Likes	Dislikes

Care Guide: Leisure Activities

List any leisure activities that your family member particularly enjoys or particularly dislikes.

TV shows/movies:

Likes	Dislikes

Hobbies/Activities in the Home:

Likes	Dislikes

Care Guide: Home Safety

A home safety inspection is critical to prevent injuries from home accidents. Simple precautions or adjustments to the environment can help ensure safety.

- Emergency Numbers and address are posted by phones
- Phones are available in each room and accessible in the event of a fall
- Windows and doors are in working order, have easy to use knobs and secure locks
- Water heater is set at 120 degrees to prevent scalding
- Medications are clearly labeled and safely stored
- Electrical outlets and cords are in good condition and correctly used
- Electrical overload protection and ground fault circuit interrupters (GFCI) are used in important areas
- Smoke alarms and carbon monoxide detectors are installed and batteries are checked every
 6 months
- Adequate lighting, including nightlights, are used in kitchen, hallways, bathrooms and stairs
- Tripping hazards are removed (thresholds, carpets, cords, stairs)
- Flooring is even and non-slippery
- Steps, stairs, and railings are in proper condition and free of debris or objects
- Furniture is stable and easy to use

Care Guide: Leisure Activities

Leisure activities/clubs outside the home:

Name of Club:	Name of Club:
Contact Person:	Contact Person:
Phone:	Phone:
How Often:	How Often:
Other Notes:	Other Notes:

Vacation/Travel:

Likes	Dislikes

■ Planning Ahead

Introduction

It might be difficult to consider that, at some point, illness may prevent you from continuing to provide care for your family member. It is even more difficult to consider your elder family member outliving you. It is important to legally establish the level of care you would like to continue for your family member in your possible absence.

This section is intended to help you organize information and plans in the event that someone would have to assume your care giving responsibilities. It can be used to facilitate discussion among your family members or to organize your own thoughts.

Planning Ahead: Legal and Estate Information

Location of Will:	
Location of Codicil:	
Date of Will:	Date of Codicil:
Will Prepared by:	
Witness to the Will:	
Name of Executer:	
Executor's Phone:	
Executor's Address:	
Location of Trust Agreement	
Location of Trust Agreement	
Name of Trust:	Date of Trust:
_	Date of Trust:
Name of Trust:	Date of Trust:
Name of Trust: Name of Trustee:	Date of Trust:
Name of Trustee: Trustee's Phone:	Date of Trust:
Name of Trust: Name of Trustee: Trustee's Phone: Trustee's Address:	Date of Trust:
Name of Trust: Name of Trustee: Trustee's Phone: Trustee's Address: Name of Beneficiary:	Date of Trust:

Planning Ahead: Advance Health Care Directives Quick Glance

This is not an Advance Health Care Directive and should not be used as a legally binding document. Rather, this page provides you with some things to consider when developing an Advance Health Care Directive. Be sure to include a copy of the official Advance Health Care Directive with this sheet in the SCOR.

Have you spoken about your wishes with your:

	Family	Ph	ysician(s)	Friends	
	Clergy	Atto	rney	Case Manager	
Does the person(s) you ha			•	spoken to this perso e medical care?	n about your current
Yes	No			Yes	No
Is the person(s) you have decisions on your behalf Resuscitate (DNR) Orde	aware of your "I	Oo Not	Advance I	given a copy of your o Health Care Directiv inted to make decisio	e to the person(s) you
Yes	No			Yes	No
	•	ns on your		on appointed to e of your wish to	
		Yes	No)	

Planning Ahead: Advance Health Care Directives Quick Glance (continued)

Attending Physician's Contact Information

Name:
Address:
Email:
All Telephone Numbers:
Fax:
Secondary Physician's Contact Information (If available):
Secondary Physician's Contact Information (If available): Name:
Name:
Name: Address:

Additional Resource:

U.S. Living Will Registry (www.uslivingwillregistry.com/forms.shtm): This website provides Advance Health Care Directives information for each state.

Planning Ahead: Advance Health Care Directives Quick Glance (continued)

Sibling's Name:
Sibling's Spouse:
Date of Birth:
Address:
Phone numbers:
Email:
Sibling's Name:
Sibling's Spouse:
Date of Birth:
Address:
Phone numbers:
Email:
Sibling's Name:
Sibling's Spouse:
Date of Birth:
Address:
Phone numbers:
Email:

Planning Ahead: Future Living Arrangements

It is important to consider your family members future living arrangements. Where and in what type of situation would you like to see your family member live? Alone or with other family members? How much supervision will be necessary?

First Choice of Future Residential Provider
Name:
Phone Number:
Second Choice of Future Residential Provider
Name:
Phone Number:
If currently in a supported living environment, list the following information:
Home Manager Name:
Phone Number:
Case Manager Name:
Phone Number:
Level of supervision required:

Planning Ahead: Financial Information

Bank			
Company:		Phone:	
Branch Location:			
Checking Account Number:	Savings Accou	ınt Number:	Safety Deposit Box:
Contact Person/Title:			
Email:	Phone:		Fax:
Bank			
Company:		Phone:	
Branch Location:			
Checking Account Number:	Savings Accou	ınt Number:	Safety Deposit Box:
Contact Person/Title:			
Email:	Phone:		Fax:
Financial Accountant/A	dvisor		
Company:		Phone:	
Contact Person/Title:			
Address:			
Email:	Phone:		Fax:

Investment Banker			
Company:		Phone:	
Contact Person/Title:			
Address:			
Email:	Phone:		Fax:
Income Tax Preparer			
Company:		Phone:	
Contact Person/Title:			
Address:			
Email:	Phone:		Fax:
Attorney			
Attorney Company:		Phone:	
		Phone:	
Company:		Phone:	
Company: Contact Person/Title:	Phone:	Phone:	Fax:
Company: Contact Person/Title: Address: Email:		Phone:	Fax:
Company: Contact Person/Title: Address:		Phone:	Fax:
Company: Contact Person/Title: Address: Email: Power of Attorney (Fin			Fax:
Company: Contact Person/Title: Address: Email: Power of Attorney (Fin Company:			Fax:

Checking and Money Market Accounts
Name on Account:
Name of Bank:
Address:
Type of Account:
Account Number:
Name of Banker:
Checking and Money Market Accounts
Name on Account:
Name of Bank:
Address:
Type of Account:
Account Number:
Name of Banker:
Checking and Money Market Accounts
Name on Account:
Name of Bank:
Address:
Type of Account:
Account Number:
Name of Banker:

Individual Retirement Accounts		
Name on Account:		
Туре:	e: Account Num	
Name of Institution:		
Address:		
Date Opened:		Interest Rate:
Maturity Date:		Original Deposit amount:
Safety Deposit Box		
Name of Bank/Branch		
Safety Deposit Box Address:		
Name of Box Holder:		
Box Number:		
Location and Custodian of Key:		
Credit Cards		
Name on Account:		
Issuing Company:		
Address:		
Phone:		
Account Number:		Expiration Date:

Credit Cards	
Name on Account:	
Issuing Company:	
Address:	
Phone:	
Account Number:	Expiration Date:
Certificates of Deposit	
Date:	Interest Rate:
	interest Rate.
Bank:	interest Rate.
Bank: Certificate Number:	Maturity Date:

Securities (Stocks, Mut	ual Funds, etc.)		
Name of Security:			
Name of Broker:			
Date:	Number of Shares Purchased:		
	Price:		
	Net Total Cost:		
Date:	Number of Shares Sold:		
	Price:		
	Net Total Proceeds:		
	Profit/Loss:		
Coougition (Stooles Mut	val Funda ata\		
Securities (Stocks, Mut	uai Funds, etc.)		
Name of Security:			
Name of Broker:			
Date:	Number of Shares Purchased:		
	Price:		
	Net Total Cost:		
Date:	Number of Shares Sold:		
	Price:		
	Net Total Proceeds:		
	Profit/Loss:		
Securities (Stocks, Mut	ual Funds, etc.)		
Name of Security:			
Name of Broker:			
Date:	Number of Shares Purchased:		
Date.	Price:		
	Net Total Cost:		
Date:	Number of Shares Sold:		
	Price:		
	Net Total Proceeds:		
	Profit/Loss:		

Bonds				
Broker:			Account Exec. Phon	e:
Address:				
Name on Accoun	t:		Account Number:	
Transaction Date	Bond Name	Bought or Sold	Quanitity	Unit Price
Bonds				
Bonds Broker:			Account Exec. Phon	e:
			Account Exec. Phon	e:
Broker:	t:		Account Exec. Phon Account Number:	e:
Broker: Address:	t: Bond Name	Bought or Sold		e: Unit Price
Broker: Address: Name on Accoun		Bought or Sold	Account Number:	
Broker: Address: Name on Accoun		Bought or Sold	Account Number:	
Broker: Address: Name on Accoun		Bought or Sold	Account Number:	
Broker: Address: Name on Accoun		Bought or Sold	Account Number:	
Broker: Address: Name on Accoun		Bought or Sold	Account Number:	

Income Tax Federal Tax Refund Names SSN Paid Amount Loan Name of Loan: Type of Loan: Loan Account Number: Original Amount of Loan: Due Date: Interest Rate: Term: Lender: Phone: Address: Loan Name of Loan: Type of Loan: Loan Account Number: Original Amount of Loan: Due Date: Interest Rate: Term: Lender: Phone: Address:

Automobile	
Name on Title:	
Make/Model:	Year:
Vehicle Identification Number:	Color:
Price	Date Purchased:
Dealer:	Phone:
Address:	
Automobile	
Name on Title:	
Make/Model:	Year:
Vehicle Identification Number:	Color:
Price	Date Purchased:
Dealer:	Phone:
Address:	
Automobile	
Name on Title:	
Make/Model:	Year:
Vehicle Identification Number:	Color:
Price	Date Purchased:
Dealer:	Phone:
Address:	

Property Owned	
Description:	
Name on Property:	
Date Acquired:	Purchase Date:
Attorney:	Phone:
Address:	
Mortgager:	
Address:	
Mortgage Amount:	Term:
Date Sold:	Sale Price:
Property Owned	
Property Owned Description:	
Description:	Purchase Date:
Description: Name on Property:	Purchase Date: Phone:
Description: Name on Property: Date Acquired:	
Description: Name on Property: Date Acquired: Attorney:	
Description: Name on Property: Date Acquired: Attorney: Address:	
Description: Name on Property: Date Acquired: Attorney: Address: Mortgager:	

Collections and Valuables	
Item:	
Date Acquired:	Purchase Price:
Date Sold:	Sale Price:
Comments:	
Collections and Valuables	
Item:	
Date Acquired:	Purchase Price:
Date Sold:	Sale Price:
Comments:	
Collections and Valuables	
Collections and Valuables	
	Purchase Price:
Item:	Purchase Price: Sale Price:
Item: Date Acquired:	
Item: Date Acquired: Date Sold:	
Item: Date Acquired: Date Sold: Comments:	
Item: Date Acquired: Date Sold: Comments: Collections and Valuables	
Item: Date Acquired: Date Sold: Comments: Collections and Valuables Item:	Sale Price:

Life Insurance			
Company:		Phone:	
Policy Number:			
Where Policy is Located:			
Insurance Company Location:			
Contact Person/Title:			
Email:	Phone:		Fax:
Life Insurance			
Company:		Phone:	
Policy Number:			
Where Policy is Located:			
Insurance Company Location:			
Contact Person/Title:			
Email:	Phone:		Fax:
Burial Policy			
Funeral Home:		Phone:	
Cemetery:		Phone:	
Contact Person/Title:			
Address:			
Email:	Phone:		Fax:
Plot Number and Location:			
Location of Pre-Payment Recei	pts or Deeds:		
Specific Instructions:			

Planning Ahead: Guardianship

Letters of Guardianship have been approved by	<i>y</i> :
Judge:	Date:
Approved Guardian's Name:	
Relationship:	
Address:	
Phone:	Fax:
Approved Successor Guardian's Name:	
Relationship:	
Address:	
Phone:	Fax:
Approved Successor Guardian's Name:	
Relationship:	
Address:	
Phone:	Fax:

Planning Ahead: Guardianship (continued)

If a guardian has not yet been appointed, list in order of preference the people who you would like to serve as guardian, should guardianship prove necessary in the future. Include name, address, phone number, and the person's relationship to you and your family member.

Name	Address	Phone Number	Relationship

Other Resources

MilitaryHOMEFRONT: www.militaryhomefront.dod.mil/

MilitaryHOMEFRONT is the official Department of Defense website for quality of life information and resources. Sections tailored to meet the specific and unique needs of Leadership, Troops and Family Members, and Service Providers, MilitaryHOMEFRONT provides current, reliable, and easily accessible information for the military community. Whether you live the military lifestyle or support those who do, you will find what you need! Information specific to family members with special needs and the Exceptional Family Member Program (EFMP) can be found at www.militaryhomefront.dod.mil/tf/efmp.

HOMEFRONTConnections: https://apps.mhf.dod.mil/homefrontconnections

HOMEFRONTConnections is a Department of Defense social networking environment designed for those who are in the military, in a military family, or who support the military and their families. Within this password-protected environment, families can join family readiness groups. These groups, or "Communities," allow family members to share information and resources.

Plan My Move: www.militaryhomefront.dod.mil/tf/movingandrelocation

Plan My Move, available through MilitaryHOMEFRONT, is a set of online organizational tools designed to make frequent moves easier and less disruptive for service members and families. Available tools include a customizable calendar, to-do lists, departure and arrival checklists, installation overviews, and installation-specific information on a number of topics, such as education, transportation, child care, and employment. This site is easy to use and provides quick information and results.

Military OneSource: www.militaryonesource.com

Military OneSource provides information and resources to help balance work and family life. Consultants are available twenty-four hours a day, seven days a week by phone, online, or via email offering personalized support to any service or family member.

TRICARE: www.tricare.mil

The TRICARE website provides information about military health plans, military treatment facilities, and other TRICARE resources.

Exceptional Family Member Program information by branch:

For branch specific EFMP information, visit www.militaryhomefront.dod.mil. Enter "EFMP" and your branch of service in the search bar. For National Guard EFMP information visit, www.guardfamily.org.

RELEVANT FORMS

DD Form 2792, Exceptional Family Member Medical Summary can be found at www.dtic.mil/whs/directives/infomgt/forms/forminfo/forminfopage2336.html.

DD Form 2792-1, Exceptional Family Member Special Education/Early Intervention Summary can be found at www.dtic.mil/whs/directives/infomgt/forms/forminfo/forminfopage2581.html.

ACRONYM INDEX

Use the table below to list any acronyms that you may need to remember.

Acronym	Meaning

ACRONYM INDEX (continued)

Acronym	Meaning



Created for you by the Department of Defense Exceptional Family Member Program

