

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 Veteran you are caring for. You can keep this information in any form that works for you, such as a file folder with your Veteran's name on it, a binder or other types of organizational tools.

The patient file 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 makes the most sense to you** – this should be a place 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 **Keep it up to date.** An outdated file won't do you much good when you're standing in the emergency room at midnight.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 Veteran's Patient File

Use 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.

- Veteran's personal and medical data (Personal Medical Record)
- Insurance information
 - VA benefits
 - 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 Veteran'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 (you can write these in below)

Adapted, with permission, from the National Family Caregiver Association resource "Patient File Checklist."

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