



Patient File Checklist for the Caregiver

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Caregivers, Do you have all of the following documents or notes typed out or copied and stored securely in one place?

This quick and easy checklist makes your life as a caregiver easier!

Print this for every patient's folder to help you organize. Then, grab your folder and take it to every doctor check-up and specialist appointment.



Patient's Basic Information:

Full Name: _____

Address: _____

Date of Birth: _____ Phone: _____

Patient's Insurance Information:

Medicare Number: _____

Medicaid Number: _____

Private Insurance Info: _____

Patient's Medical Information:

Diagnosis: _____

Allergies: _____

Past Surgeries or Treatments: _____

Current Medications Including Prescription and Over-the-Counter Meds and Vitamins.
Any Reactions to Past Medications? _____

Legal Documents:

Caregiver's Full Name: _____

Caregiver Address and Phone: _____

Power of Attorney: _____

Health Care Proxy: _____ Living Will: _____



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