Guardian Angel senior services

Medical Information Organization Checklist

Keep all your medical information in one place and easily accessible. You can print this checklist to use in a physical file folder with hard copies of your documents or to collect and save everything digitally in a virtual folder. If you are unable to include the originals, you can also use photocopies, scans, or pictures to save your documents in your desired location. Share access to your digital or physical files with a trusted family member or caregiver. We recommend that you review and update the items on this list every 6–12 months or after a major health change.

Core Documents:

- ☐ Photo identification
- ☐ Insurance cards, front and back
- ☐ Patient portal login credentials
- ☐ Advance directives, living will, healthcare power of attorney, etc.
- ☐ Do Not Resuscitate (DNR) orders
- ☐ Organ donor registration

Medication Lists:

- ☐ Current medications, including name, dose, frequency, and prescribing doctor
- ☐ Over-the-counter drugs, vitamins, and supplements taken regularly
- ☐ Past medications and why they were stopped
- ☐ All known drug allergies and your reaction to each
- ☐ Pharmacy contact information with your dates and auto-refill settings

Medical History:

- ☐ Chronic condition diagnoses with associated dates
- ☐ Surgeries and hospitalizations including date, facility, and surgeon for each
- ☐ Immunization records
- ☐ Recent test results, including bloodwork, imaging, biopsies, etc.
- ☐ Family medical history, including heart disease, cancer, diabetes, etc.

Providers & Contacts:

- ☐ Primary care physician (PCP), including contact information such as name, phone, address, etc.
- ☐ All specialists, including dentists, therapists, optometrists, etc., as well as the contact information for each to include name, specialty, phone, address, etc.
- ☐ Preferred hospital or urgent care
- ☐ Emergency contacts with relationships and phone numbers

Appointments & Tracking:

- ☐ Upcoming appointments calendar
- ☐ Symptom, blood pressure, or glucose logs
- ☐ Screening schedule for procedures, such as colonoscopy, mammogram, etc.
- ☐ Questions to ask at your next visit with your PCP or specialists

Financial & Administrative:

- ☐ Billing statements and Explanation of Benefits (EOBs)
- ☐ Records of denied claims or disputes
- ☐ Flexible Spending Account (FSA) or Health Savings Account (HSA) details
- ☐ Notes on coverage limits and out-of-pocket maximums

Quick Tip:

Keep a one-page summary of your medical information (medications, allergies, conditions, contacts) that you can hand to any emergency room doctor or new provider.

Affiliations and Certifications

Home Care, Hospice & Palliative Care Alliance of New Hampshire

Certified WBE Women's Business Enterprise

Home Care Aide Council — Setting Industry Standards Since 1967

CareScout Quality Network

Home Care Alliance of Massachusetts hca Accredited

Guardian Angel Senior Services

Guardian Angels Senior Services is a home health service agency providing in-home care to seniors and younger adults with disabilities in Massachusetts, New Hampshire, and Connecticut.

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