

Health Event and Medical Information Worksheet

An accident, injury, or diagnosis of a serious illness can demand quick decisions under stressful circumstances. Collecting and sharing important information, and making your wishes and those of your loved ones known, can help make a difficult situation easier to manage.



Personal Information

=:		
First and last name		
Address 1		
Address 2		
Telephone/email 1		
ı		
Telephone/email 2		
rereprierrer erman 2		
SSN		
331V		

Access to Key Information

WHERE IS IT?

LEGAL IDENTIFICATION Driver's license, government- issued ID card, passport	
DONOR REGISTRATION Organ donor preference card	
INSURANCE CARDS Private insurance, Medicare supplement	
HOME Keys, address, security codes, phone numbers	
VEHICLES Make, model, color, location, license plate number	
SAFETY DEPOSIT BOX Name of institution, address, keys	

Medical Documents

ITEM LOCATION/ NOTES

HIPAA AUTHORIZATION Gives permission to use your health information for certain purposes

HEALTH CARE PROXY Names a person to make medical decisions for you if you can't

LIVING WILL Instructions on the kind of care you want to receive, including whether or not you want to receive life support

HOSPITAL VISIT AUTHORIZATION FORM Ensures visitation rights for those who might not meet a hospital's definition of family member

DO-NOT-RESUSCITATE (DNR) ORDER Lets medical personal know that you do not want them to perform certain procedures to prolong your life

MEDICAL ORDERS FOR LIFE-SUSTAINING TREATMENT (MOLST) Allows you to request or refuse specific types of medical care that a do-notresuscitate (DNR) order doesn't cover

Caregiving & Support

INFORMATION/ NOTES

DISCHARGE SUMMARY Summarizes your condition, treatment, and next steps after being discharged from the hospital

CARE PLAN
Outlines the help you may
need and who will provide
it, including care at home,
managing medications,
and getting to medical
appointments

SPECIAL INSTRUCTIONS Guidance on how to use medical equipment, how to care for wounds, and how to manage medications

SUPPORT Names and numbers of agencies and individuals who can provide medical, emotional, and caregiving support

OTHER RESOURCES
Names and contact
information for local, regional,
and national organizations
that can provide information,
education, and support

Discharge Care who will provide care?				
NAME	WHAT WILL THEY DO?			
MEDICATIONS				
PRESCRIPTION INFO	NOTES			
FOLLOW-UP APPOINTMENTS & TESTS				
SCHEDULING	APPOINTMENT DETAIL			

Financial Docs	ITEM LOCATION/ NOTES
POWER OF ATTORNEY Authorizes someone to make financial decisions if you are incapacitated	
WILL Describes how property should be distributed and minor children cared for	
LETTER OF INTENT Clarifies the motivation for the distribution of property	
Advisors	NAME/CONTACT INFO
ATTORNEY	
СРА	
FINANCIAL ADVISOR	
PRIMARY CARE DOCTOR	
SURGEON	
SPECIALIST #1	
SPECIALIST #2	
SPECIALIST #3	
PHARMACIST	
FRIEND	
NEIGHBOR	
RELATIVE	
OTHER	

Having a Conversation

Conversations around medical conditions, care and caregiving, and end of life can be challenging. But when it comes to honoring wants, wishes, and needs, having these conversations is critical in preserving quality of life. The Conversation Project (www.theconversationproject.org) offers a range of discussion guides that can help you and your loved ones tackle tough topics, including helping you work through some important questions:

- What's most important at the end of life maintaining a high quality of life or living as long as possible, even if quality of life suffers?
- Do the other people involved in making decisions agree?
- What do you, your family, and friends value most?
- Have you made your wishes for yourself clear?
 Have your loved ones made their wishes for themselves clear?

Additional Resources

ELDERCARE LOCATOR:

NATIONAL ALLIANCE FOR CAREGIVING: www.caregiving.org

NATIONAL INSTITUTE
ON AGING:

FAMILY CAREGIVER ALLIANCE:

NATIONAL ASSOCIATION OF AREA AGENCIES ON AGING: www.n4a.org

THE CONVERSATION PROJECT: www.theconversationproject.org

Produced in partnership with Cogniscient and Massachusetts General Hospital.

Fidelity does not provide legal or tax advice. The information herein is general and educational in nature and should not be considered legal or tax advice. Tax laws and regulations are complex and subject to change, which can materially impact investment results. Fidelity cannot guarantee that the information herein is accurate, complete, or timely. Fidelity makes no warranties with regard to such information or results obtained by its use, and disclaims any liability arising out of your use of, or any tax position taken in reliance on, such information. Consult an attorney or tax professional regarding your specific situation.

All third-party websites herein are unaffiliated with Fidelity. Fidelity has not been involved in the preparation of the content supplied at the unaffiliated sites and does not guarantee or assume any responsibility for its content.

Fidelity Brokerage Services, Member NYSE, SIPC, 900 Salem Street, Smithfield, RI 02917 © 2016 FMR LLC. All rights reserved.

751159.2.0

1.9869702.102





