



# Patient File Checklist

Creating a patient file will assist you in advocating for the Veteran. This file serves many purposes:

- Keeps medical records organized
- Builds a history of the Veteran's health care
- Helps you and the Veteran to partner with the health care team
- Saves time because the Veteran's health information can easily be located

You can create a patient file using a simple three ring binder with dividers, an accordion file, or a computer file. As with any tool, the patient file will be useful only if it is kept up-to-date. Here are some helpful tips:

1. Store the file in a place that makes sense to you — a place where you can grab it quickly in an emergency, or on your way out the door to an appointment.
2. Always keep the file in the same place.
3. Update the Veteran's patient file after every encounter with the health care team whether face-to-face, telephone, vTel or email.

## What should the Veteran's Patient File contain?

- Veteran's Medical History
- Insurance Information
- Medications from both VA and non-VA providers including over the counter medications, vitamins, herbal remedies, etc.
- Durable Power of Attorney for Health Care
- Contact information (i.e., telephone numbers, addresses, email) for medical providers, nurses, case managers, and other health care providers
- Your observations of the Veteran's response to treatment
- Notes from the visit
- Questions for the next visit
- A large envelope or pouch to store loose documents or CDs

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