



**David York Agency Home Healthcare**

*A Commitment to Excellence in Home Healthcare*

# **Essential Documents & Emergency Information**

David York Agency, Ltd.  
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This booklet is courtesy of  
David York Agency, Ltd.

**David York Home Healthcare Agency**

is a family run business since 1984 with a family feeling. The agency was founded over 30 years ago by two Registered Nurses who long realized there was a substantial need for affordable quality home care services provided and supervised by caring individuals. We view our clients as part of the DYA family.

For more workbooks contact our office.



**Confidential Information of:**

Name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Phone \_\_\_\_\_

Cell \_\_\_\_\_

Email \_\_\_\_\_

**Compiled by:**

Name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Phone \_\_\_\_\_

Cell \_\_\_\_\_

Email \_\_\_\_\_

Relationship \_\_\_\_\_

Date Compiled \_\_\_\_\_







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## Essential Documents and Emergency Information

### 1. **Professionals List - All Contact Information**

A. Doctors

i. Primary Care \_\_\_\_\_

ii. Specialists \_\_\_\_\_

\_\_\_\_\_

B. Accountant \_\_\_\_\_

C. Attorney \_\_\_\_\_

D. Financial Advisor \_\_\_\_\_

E. Insurance Brokers \_\_\_\_\_

F. Other \_\_\_\_\_

### 2. **Medical Information**

A. Diagnosis \_\_\_\_\_

B. Allergies \_\_\_\_\_

C. Medications \_\_\_\_\_

\_\_\_\_\_

D. Treatments \_\_\_\_\_

E. Major Operations \_\_\_\_\_

F. Immunizations \_\_\_\_\_







### 3. Important Documents

	Have ✓ Original	Have ✓ Copy	Location of Documents
Social Security Card			
Birth Certificate			
Driver's License			
Marriage Certificate			
Divorce Certificate			
Passport			
Medicare/Medicaid/ Insurance Card			
Military Discharge Papers			
Deeds			
Titles			
Tax Returns for the Last Six Years			
Instructions on Location of all Files			





#### 4. Financial Accounts

Include Contact Information and Account Numbers

A. Bank Accounts \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

B. Investment/Brokerage Accounts (Stocks, Bonds, CDs, Annuities) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

C. Credit/Debit Cards \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

#### 5. Estate Planning Documents - Please Check Applicable

	Have <input checked="" type="checkbox"/>	Location of Documents
Will		
Special Instructions Regarding Personal Property		
Durable Power of Attorney		
Advanced Healthcare Directive/ Living Will		
Healthcare Proxy		
Do Not Resuscitate (DNR) Order		





## 6. **Financial Assets**

Describe Asset, Location and Documentation

Car Ownership	
Mortgage Documents	
Real Estate Holdings	
Loans Owed or Owed to them	
Original Invoices for Important Possessions	
Partnership Documents	
Jewelry and Valuables	
Safe Combination and Directions	
Location of Safety Deposit Key	
Other Assets	





**7. Insurance Policies** - Include Contact Information and Policy Numbers

- A. Home \_\_\_\_\_
- B. Auto \_\_\_\_\_
- C. Health \_\_\_\_\_
- D. Long Term Care \_\_\_\_\_
- E. Life \_\_\_\_\_

**8. Recurring Bills** - Include Company, Account Numbers and Contact Information

- A. Mortgage \_\_\_\_\_
- B. Loans \_\_\_\_\_
- C. Utilities \_\_\_\_\_
  - i. Telephone \_\_\_\_\_
  - ii. Electric \_\_\_\_\_
  - iii. Gas \_\_\_\_\_
- D. Insurance Premiums (annual/monthly/quarterly) \_\_\_\_\_  
\_\_\_\_\_
- E. Car Lease/Payments \_\_\_\_\_
- F. Annual Expenses (i.e. home alarm) \_\_\_\_\_  
\_\_\_\_\_
- G. Deliveries (i.e. newspaper, milk) \_\_\_\_\_  
\_\_\_\_\_









## 9. Sources of Income

Sources of Income	Description of Income & Contact Information	Location of Documents
Annuities		
Social Security		
Pensions		
Annual Distributions from Retirement Accounts		
VA Benefits		
Disability Payments		
Retirement Plans		
Disability Plans		
Government Benefits for which you are Eligible		





## 10. End of Life Arrangements

	Have ✓	Location of Documents
Cemetary Plot Ownership		
Pre-Planned Burial Papers		
Personal Statement Regarding Burial Services		

## 11. Computer Information

A. Email Accounts and Passwords \_\_\_\_\_

\_\_\_\_\_

B. Password for Computer \_\_\_\_\_

\_\_\_\_\_

C. Recurring Online Billing \_\_\_\_\_

\_\_\_\_\_





1. Professionals List - All Contact Information for:
  - A. Doctors: Primary Care and Specialists
  - B. Accountant
  - C. Attorney
  - D. Financial Advisor
  - E. Insurance Brokers
2. Medical Information
  - A. Diagnosis
  - B. Allergies
  - C. Medications
  - D. Treatments
  - E. Major Operations
  - F. Immunizations
3. Important Documents (Originals and/or copies)
  - A. Social Security Card
  - B. Birth Certificate
  - C. Driver's License
  - D. Marriage Certificate
  - E. Divorce Certificate
  - F. Passport
  - G. Medicare / Medicaid / Insurance Card
  - H. Military Discharge Papers
  - I. Deeds
  - J. Titles
  - K. Tax Returns for the Last 6 Years
  - L. Instructions on Location of all Files
4. Financial Accounts - All contact information and account numbers for:
  - A. Bank Accounts
  - B. Investment / Brokerage Accounts
    - Stocks
    - Bonds
    - CDs
  - C. Credit / Debit Cards
5. Estate Planning Documents
  - A. Will
  - B. Special Instructions Regarding Personal Property
  - C. Durable Power of Attorney
  - D. Advanced Healthcare Directive / Living Will
  - E. Healthcare Proxy
  - F. Do Not Resuscitate (DNR) Order
6. Financial Assets
  - A. Car Ownership
  - B. Mortgage Documents
  - C. Real Estate Holdings
  - D. Loans Owed or Owed to them
  - E. Tax Returns
  - F. Insurance Policies
    - Home
    - Auto
    - Health
    - Long Term Care
    - Life
  - G. Original Invoices for Important Possessions
  - H. Partnership Documents
  - I. Jewelry and Valuables
  - J. Safe Combination and Directions
  - K. Location of Safety Deposit Key
7. Insurance Policies
  - A. Home
  - B. Auto
  - C. Health
  - D. Long Term Care
  - E. Life
8. Recurring Bills:
  - A. Mortgage
  - B. Loans
  - C. Utilities
    - Telephone
    - Electric
    - Gas
  - D. Insurance Premiums (Annual/Monthly/Quarterly)
  - E. Car Lease/Payments
  - F. Annual Expenses (i.e. home alarm)
  - G. Deliveries (i.e. newspaper, milk)
9. Sources of Income
  - A. Annuities
  - B. Social Security
  - C. Pensions
  - D. Annual Distributions from Retirement Accounts
  - E. VA Benefits
  - F. Disability Payments
10. End of Life Arrangements:
  - A. Cemetery Plot Ownership
  - B. Pre-planned Burial Papers
  - C. Personal Statement Regarding Burial Services
11. Computer Information
  - A. Email Accounts and Passwords
  - B. Password for Computer
  - C. Recurring Online Billing

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*Choosing the right home healthcare agency is critical to ensuring high quality home care. With David York Agency, you have peace of mind knowing that you will receive exceptional healthcare administered by experienced, compassionate and caring professionals.*

## ***Getting Started***

*From the very first time you call David York Agency, we make every step of the process as easy and comfortable as it can be.*

- 1.** An Intake Coordinator will discuss your unique situation and requirements.
- 2.** Within 24 hours of taking on a case, a Nursing Supervisor conducts an initial home visit to develop a comprehensive care plan.
- 3.** We contact your Physician and any other concerned healthcare professionals in order to develop an appropriate treatment plan.
- 4.** We schedule regular visits to your home by a Registered Nurse to make sure the care provided is appropriate and meets your health and rehabilitative needs. Changes and any necessary adjustments are made as often as needed.



**David York Agency Home Healthcare**

*A Commitment to Excellence in Home Healthcare*

**David York Agency provides Skilled Healthcare Professionals:**

- RNs/LPNs
- Home Health Aides
- Personal Care Aides

**We Deliver:**

- Elderly Care
- Private Duty
- Home Care
- Live In/Live Out
- Transition Care from Hospital to Home

**We provide the services you need:**

- Bathing, dressing, grooming and personal hygiene
- Meal preparation according to any dietary requirements
- Household tasks and errands
- Personal laundry and shopping
- Escorting to doctors and health care appointments
- Accompany on walks, outings and other pleasant events
- Errands and shopping

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