

PERSONAL RECORDS INDEX

A Personal Record Notebook provides ready access to information about your relative during application interviews, medical appointments, or in your absence. Include his/her name on the cover and inform your family and emergency contact of its location should an emergency arise.

IMPORTANT PEOPLE AND CONTACT INFORMATION

- ❖ Family members and friends
- ❖ Guardian, if appointed
- ❖ Primary Care Doctor, Dentist, Medical Specialists
- ❖ Vendors for Adaptive Equipment Purchase or Repair
- ❖ Day and Residential Programs
- ❖ Coordinator of Community Services
- ❖ By Their Side Advocate
- ❖ Representative Payee for Social Security
- ❖ Trustee of a Special Needs Trust
- ❖ Your attorney

IMPORTANT DOCUMENTS

- ❖ Social Security Card; State Identification Card from MVA
- ❖ Medical Insurance and Prescription Cards (Medical Assistance, Medicare, Other)
- ❖ Social Security and Other Financial Benefit Eligibility Letter(s)
- ❖ Birth Certificate; Baptism Certificate
- ❖ IEP describing Special Education Services (if DDA determination not yet complete)
- ❖ DDA Eligibility Letter
- ❖ Most Recent Individual Plan
- ❖ Legal documents (Guardianship, Power of Attorney, etc)
- ❖ Special Needs Trust Document
- ❖ Letter of Intent
- ❖ Pre-Paid Burial Fund Information

MEDICAL INFORMATION

- ❖ Medical History including vaccinations, chronic illness, allergies, surgeries
- ❖ Evaluation(s) identifying intellectual/developmental disability
- ❖ Medication and Reason Prescribed
- ❖ Special Instructions for Medical/Dental care

FINANCIAL INFORMATION

- ❖ Bank Account name, numbers, and contact information
- ❖ Wages
- ❖ Social Security Benefits Letter

PERSONAL PREFERENCE AND SUPPORT INFORMATION

- ❖ Individual Profile <http://www.bytheirsideside.org/resources-educational.html>

CONTACT NOTES - Issues, concerns, and resolution, with date and person contacted/ph.