



# Valley Comfort

Assisted Living & Dementia/Alzheimer's Residence

When dealing with the transition of a loved one's living situation or a medical emergency it is necessary to have a number of documents. These situations are often unexpected and are always stressful. Having an understanding of what documents will be needed and collecting them ahead of time can help minimize the stress when situations do occur.

## When are legal documents required?

When moving into an assisted living community, when hospitalized, when displaced by an emergency or natural disaster, when applying for benefits, when selling a home or for end-of-life care.

## What is HIPAA?

The Health Insurance Portability and Accountability Act (HIPAA) requires a written release in order for a doctor's office to give you or others, such as insurance companies, access to an individual's health records. This release also grants you permission to discuss their care with their physicians. While their primary care physician should have this form included in their medical chart, a separate form will be needed if they are treated at an ER or are admitted to a hospital.

## Durable vs. Health Care Power of Attorney

Someone who is designated the Durable Power of Attorney has the authority to make *financial* decisions in the event that the individual is not able to make decisions for themselves. A Health Care Power of Attorney, also referred to as a Health Care Proxy, can only make *medical* decisions. These roles can be designated to two different individuals or one person can be granted the authority over both.

---

## Essential Documents Checklist for Health Care Facility Admission

- Driver's license/ID Card
- Social Security card
- Insurance card
- Health Care Power of Attorney

---

## Recommended Long Term Documents Checklist

### LEGAL DOCUMENTS

- Birth certificate
- Passport
- Marriage certificate/  
divorce record
- Military records

### HEALTH CARE

- Authorization to release  
health-care information  
(HIPAA form)
- Living Will/Advance  
Directives/DNR

### END-OF-LIFE AND ESTATE PLANNING

- Last Will and Testament
- Durable Power of Attorney
- Organ donor card
- Life-insurance policy

### FINANCIAL RECORDS

- Bank accounts
- Credit cards
- Tax returns
- Mortgage records
- Record of assets
- Partnership/corporate  
agreements

- 401(k)/pension accounts
- Deeds
- Stock certificates
- Safe deposit box keys
- Vehicle title(s)

### LIST OF CONTACTS

- Clergy members
- Beneficiaries
- Insurance agent
- Financial advisors with  
knowledge of wills and  
finances, such as an  
attorney, financial planner,  
broker or tax advisor

[valleycomfortinc.com](http://valleycomfortinc.com)

(209) 544-8676 | [info@valleycomfortinc.com](mailto:info@valleycomfortinc.com)

LIC #507001176