



# Emergency Records Organizer

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# Emergency Records



- Each of us has a lot of information necessary to maintain our lifestyle.
- If you look online, you will find multiple books offering forms to record information about ongoing life events.
- Since you are active computer users, the best way to record this information is to use the computer.
  - It's faster and easier to read
  - They are easier to customize for your circumstance
  - You can update information easily, and
  - You can make it secure as needed



# What is the Goal of these Records?

## **We are Not:**

- Calculating or capturing our net worth.
- Tracking cash or stock values in our accounts.
- Making an inventory of everything we own.

## **We are:**

- Recording critical information about things to do in an emergency
- Recording the types of transactions and events that we routinely perform
- Recording where our assets are held

# Who is the Customer?



- You. There are simply too many things to remember about life and having a written record is critical
- Family members who need information about ongoing events when you are not available.

# When Will These Records be Used?



- You or a family member is suddenly incapacitated
- You or a family member has a medical emergency
- Your wallet is lost or stolen and it contains critical documents
- There is a fire or other sudden damage to your property
- You simply forget some critical information and need to refresh your memory

# Confidentiality is an Issue



- Some of the data is highly confidential and must not fall into the wrong hands
- The first 11 sections of the ERO contain “sensitive” information but not highly confidential. You can print these sections and make them available to other family members
- The last 8 sections of the ERO are considered “confidential” information and should be stored in a secure location.

# Using the ERO Forms



- The forms were created using MS Word.
- They are saved as “doc” files so that users with Word 2003 can use them.
- All blank documents are stored on the CAT website along with the presentation materials
- Copy the Sections of the ERO forms as separate files in a folder on your hard drive. You can delete any section you choose not to use.
- You may wish to use your scanner and digital camera to record certain types of information.
- Once completed you should back up the forms onto a suitable media, i.e. , flash drive, external hard drive, burn a CD, etc.

# Customize the Forms



- Sections are comprised of Word Tables that cover a collection of information
- Expand or delete Tables or entire Sections as needed
- You can navigate within a Table using the Tab key, but you must use the mouse to move to a new Table
- If you make a mistake, press “Ctrl Z” to undo your keystroke. Press it multiple times to undo several keystrokes.

# What is Success?



- You don't have to complete every Section to be successful. Any information is better than nothing.
- Don't worry about information such as magazine subscriptions, etc. Focus on the big stuff.
- Don't try to complete all Sections at once. It's a big job so work on one Section at a time.
- Plan to check the information each year when you prepare your income taxes. Modest changes can be performed quickly on your computer.

# Table of Contents



- Sec 1 – Emergency Contact Information
- Sec 2 – Medical Information
- Sec 3 – Personal Information
- Sec 4 – Insurance
- Sec 5 – Recurring Payments
- Sec 6 – Wills, Trust and Power of Attorney
- Sec 7 – Professional Advisors
- Sec 8 – Other Important Documents
- Sec 9 – Memberships
- Sec 10 – Life Events
- Sec 11 – Safety Deposit Box and Home Safes
- Sec 12 – Personal Confidential Information
- Sec 13 – Cards in Wallet or Purse
- Sec 14 – Checking and Savings Accounts
- Sec 15 – Investment Accounts
- Sec 16 – Real Estate and Mortgages
- Sec 17 – Jewelry and Valuables
- Sec 18 – Websites and Passwords
- Sec 19 – Miscellaneous Records

# Details of the ERO



- Let's walk through each Section to better understand the information.
- If you think of something that is missing – please suggest it to the group.
- Remember, every person's needs are different and your end product will be quite different from the generic forms.