

Members of the PCC,

Are you having difficulty finding things to do while in partial quarantine and social isolation? Have you completed enough puzzles, watched enough TV, read enough books, attended enough zoom meetings that you are looking for something new to do? Let me suggest a new and exciting activity - writing your Professional Will.

In all seriousness, every practicing therapist must have a Professional Will. Creating one does not involve attorneys, but only a few hours of your time. A Professional Will includes a list of your current patients and other information, for example, how to access your records and change your voicemail message. Most importantly, you designate one or two trusted colleagues who will notify your patients should you become seriously ill or die.

I have been involved in several sudden deaths of therapists. In each experience, I witnessed their colleagues and family members suffer because there had been no planning. For example, surviving colleagues had no way of contacting patients. They had to wait for them to appear at the door, and then do the painful job of informing and consoling their colleague's patients. In other instances, the therapist's spouse was burdened with the task of calling his/her patients.

Just as with the coronavirus, we wear masks not only to protect ourselves but also to protect our loved ones and people with whom we interact. Having a Professional Will protects you, your patients and your family. Parts of the will can also be helpful when you go on vacation and need to provide information to the colleague covering your practice.

We now have instructions, examples and templates of a Professional Will on our website ([CarolinaPsychoanalytic.org](http://CarolinaPsychoanalytic.org)). If you have any questions or need any help in writing your professional will, please contact me at [ernie.braasch@gmail.com](mailto:ernie.braasch@gmail.com) or 919-291-8866.

Ernie Braasch

Me, M.D.  
Rd., Apt. B1  
Triangle, NC 2  
(919)

**Executor of Professional Will:**

Primary: XXX  
Work/Cell: 919-  
Home: 919-  
[xxx@gmail.com](mailto:xxx@gmail.com)

Back-up: YYY  
Cell: 919-  
Home: 919-  
[yyy@aol.com](mailto:yyy@aol.com)

**Medication Coverage:**

ZZZ, MD  
Work: 919-  
Cell: 919-  
[zzz@gmail.com](mailto:zzz@gmail.com)

BBB, MD  
Work: 919-  
Home: 919-  
[bbb@hotmail.com](mailto:bbb@hotmail.com)

Son: SSS  
Cell: 412-  
[sss@hotmail.com](mailto:sss@hotmail.com)  
Spouse:

Daughter: DDD  
Cell: 917-  
[ddd@gmail.com](mailto:ddd@gmail.com)  
Spouse:

Executor of Personal Will:  
LLL,JD  
Work: 919-  
Cell: 919

Accountant:  
AAA  
Work: 919-  
Other: 919-  
[aaa@gmail.com](mailto:aaa@gmail.com)

**Location of Home/Office Keys and File Cabinet Keys:**

A set of keys to my office, secretary desk (under photos) and file cabinets (next to large desk & in closet) are in my entrance hall bureau - top middle drawer, in a **MANILLA ENVELOP.**

Keys to my apartment are held by the apartment manager and Dr ZZZ 919-, XXX 919-, CM 919-, VC 919-.

Daughter: DDD - 917-

Son: SSS - 412-

## **Notification Of Patients and Supervisees**

### 1.) **My Schedule:**

It is in my daily planner which I keep with me. There is a copy of my next week in the office and a typical week on the desktop of my MacBook Air and Pro (upper right corner.) I often travel with the MacBookAir computer. There is also a hard copy in the entrance hall cabinet MANILLA ENVELOP. To login to both my Mac computers, use password: "e...."

### 2.) **Location of patient names & telephone numbers:**

The MacBook Pro (password: e...) On desk in front of window - find Patient List with phone and emails 2020 & weekly schedule (upper right corner). Most recent telephone numbers: my iPhone under Contacts (password: 8....) A hard copy is in the MANILLA ENVELOP.

A.) I would prefer that you would speak to patients rather than send an email. If you can't reach a patient directly and can leave a message, you can say their next appointment is canceled and request they call you.

B.) Please change my phone voice message to read "This is the home and office of Dr. Me. I am currently not available. Please call (your name) at (your number.)" If you have my cell phone, you can dial "\*86" and enter password (8.#) & choose "change Personal Option" (4). Then choose "change Personal Greeting" (3) & and then choose "\*" to change the message. From your phone, you can call 888-294-6804 and say you are an approved account manager (XXX, YYY & DDD are authorized). You just need my phone number 919-and pin - 8... They will help you.

C.) To access emails: Only the MacBook Air (e...), cell phone (8..) and iPad (8..) are set up for email. Password are in the ( ). From your computer go to [www.google.com](http://www.google.com) and sign into Me@[gmail.com](mailto:Me@gmail.com) with user name: Er.... and password: (\$... You need my cell phone to complete the 2FA verification and get the code. Remember you could use my iPad to get email! Password - 8...

3.) **Patient/supervisees records:**

A.) The most recent patient records on active patients are located on the desktop of my MacBook Pro (e...). There are also charts in the two file cabinets. Current, more frequently seen patients' hard copy files/charts are in the small teak file cabinet to the left of the large desk. The keys are in the brown envelop. Each patient in the computer notes, Patient List 2020, Pt Meds Alphabetical and Pt Meds Renewal IV is under their 1st and last initial/occasionally followed by a small letter in their last name.

B.) An alphabetical list of patients who are on medications is located on the desktop of my computer - right side. A list of the same patients ordered by when their medications need to be renewed is in the same place.

C.) For more patient notes, go to Finder (extreme left on the docking station) - (Me - Patient Notes) and (Documents - 00 Practice - Patient Notes). Sorry, there is some redundancy. Most recent notes are on my desktop in file - Patients and Patients 2. Plus notes on desktop under patient's initials.

D.) Charts for patients whom I have not seen in a long time are located in the closet in the master bedroom closest to the deck.

4.) **Billing Program:**

A.) In my Lenovo computer-(computer PIN: 8.)- follow directions in the "Billing Program Directions." - This will lead you to the names, telephone numbers and billing information for every patient. The billing information is current to the end of the prior month. More recent billing information is in my appointment book. See the separate sheet on how to operate my billing program and how to print bills. You will need to change the billing address to the care of one of my children. SSS, 1 Rd., P, PA 11111 or DDD, 5 Ave., S, NY 22222.

B.) A backup copy of my billing records are in the office closet-right door- right side, top of file cabinet.

C.) I would like the executors of my professional will to be compensated at their hourly rate for any time spent closing my practice. They

should mail their bill to one of my children. My children will pay any outstanding bills for my practice out of my practice credit union account.

5.) **Additional People to Contact:**

A.) AS: 919-

B.) HC: 919-

B.) Lisa Long: 919-490-3212; 919-942-1623

C.) Malpractice Insurance: Frankel 201-356-3400. #6510642

D.) NC Medical Board: 919-326-1109

E.) Attorney: LLL,JD 919-4

F.) AAA: T 919-

# Patient Contact Information 1:

\* see weekly

\*\* see monthly

\*\*\* see occasionally

\*\*\*\*see rarely

HOME-919

WORK-919

CELL-919

PHARMACY  
-919

\*GW-George Washington 386-2716

409-5893

299-5978

209-3090

\*\*JA- John Adams 298-1950

208-3957

399-4968

395-6855

\*TJ-Thomas Jefferson 586-9944

399-2299

239-6755

385-7865

\*\*JMa-James Madison 277-3344

386-3877

397-4855

385-7865

\*JMo-James Monroe 388-5846

397-5544

378-4499

395-6855

JQA-John Q Adams 298-2998

208-3957

399-4567

395-6855

\*AJ-Andrew Jackson 276-4400

307-5599

298-5566

385-7865

\*\*\*MVB-Martin VanBuren309-4477

394-6699

394-6767

209-3090

WH-William Harrison 287-4488

375-7878

397-5674

395-6855

\*JT-John Tyler 278-4567

298-5748

298-4765

395-6855

\*JP-James Polk 287-4647

409-0055

398-6574

209-3090

\*\*\*ZT=Zachary Taylor You get the idea!

\*\*\*\*MF-Millard Fillmore

\*FP-Franklin Pierce

\*JB-James Buchanan

## **Patient Email Addresses:**

ID	email	DOB	Cell #	Pharmacy #
JA	<a href="mailto:john.adams@navy.gov">john.adams@navy.gov</a>	10/30/1735		
JQA	<a href="mailto:jqadams@amistad.org">jqadams@amistad.org</a>	07/11/1767		
JB	<a href="mailto:jamesbuchanan@bachelor.gov">jamesbuchanan@bachelor.gov</a>	04/23/1791		
MVB	<a href="mailto:m.vanburen@firstdutch.com">m.vanburen@firstdutch.com</a>	12/5/1782		
MF	<a href="mailto:millard.fillmore@1850.org">millard.fillmore@1850.org</a>	01/07/1800		
WH	<a href="mailto:w.harrison@tippecanoe.org">w.harrison@tippecanoe.org</a>	02/09/1773		
AJ	andrew <a href="mailto:jackson@1812.com">jackson@1812.com</a>	03/15/1767		
TJ	<a href="mailto:tj@monticello.org">tj@monticello.org</a>	04/13/1743		
JMa	<a href="mailto:jamesmadison@constitution.gov">jamesmadison@constitution.gov</a>	03/16/1751		
JMo	<a href="mailto:j.monroe@doctrine.org">j.monroe@doctrine.org</a>	04/28/1758		
FP	<a href="mailto:franklinpierce@younghickory.com">franklinpierce@younghickory.com</a>	11/23/1804		
JP	<a href="mailto:james.polk@darkhorse.net">james.polk@darkhorse.net</a>	11/02/1795		
ZT	<a href="mailto:z.taylor@mexicanwar.gov">z.taylor@mexicanwar.gov</a>	11/24/1784		
JT	<a href="mailto:john.tyler@15kids.org">john.tyler@15kids.org</a>	03/29/1790		
GW	<a href="mailto:gwashington@mtvernon.org">gwashington@mtvernon.org</a>	02/22/1732		

Practitioners Name  
Address  
Triangle, NC 27...  
(919) ...-....

**Usual Patient Schedule:**

Monday: GW, FP

Tuesday: AJ, JB, FP, JMo, JT

Wednesday: FP, WH, JQA, JP monthly JMa

Thursday: JB, FP, GW, TJ, FP bimonthly JA

Less than monthly:

MVB, ZT, MF



## **Patient Medications:**

Renewal Date    Patient  
                    DOB

Renewal date:

01/03/18	TJ 4/13/1743	Effexor XR	37.5	QD #60
03/15/17	JMa 3/16/1751	Zoloft	100	QD
3/1/18	MVB 12/5/1782	Prozac Vyvance WellbutrinXL150	20 30	QD (90 Rx3)(Sex Z) QD QD (90 Rx3)
04/19/18	GW 2/22/1732	Ativan Celexa	1.0 40	QHS Rx3 QD
05/04/18	JA 10/30/1735	Celexa WellbutrinXL 150	20	1/2 QD #90 (taper down) QHS #90 Rx3

Practitioners Name  
Address  
Triangle, NC 27...  
(919) ...-....

Location of patient names and telephone numbers:

1 Computer (password: ..... ) On Desktop - Patient List and Patient emails 2025 (upper right corner). Most recent telephone numbers: my iPhone under Contacts-

2 Going to my billing program:

A In my computer-(computer password: .....)- double click icon “Helper.exe.app” lower right of desktop- This will lead you to the names, telephone numbers and billing information for every patient. The billing information is current to the end of the prior month. More recent billing information is in my appointment book. Each patient in the computer notes, Patient List 2025, Pt Meds Renewal is under their 1st and last initial/occasionally followed by a small letter in their last name.

For more patient notes, go to Finder (extreme left on the docking station) - (my name - Patient Notes) and (Documents - 00 Practice - Patient Notes). Sorry, there is some redundancy. Most recent notes are on my desktop in file - Patients and Patients 2. Plus notes on desktop under patient’s initials.

Again for earlier written notes, go to Documents - 00 Practice - Patient Notes.

B A backup copy of my billing records (on discs) are in the office closet-right door- right side, top of file cabinet. Current, more frequently seen patients’ hard copy files/charts are in the file cabinet to the left of the large desk. The keys are in the brown envelop located in my hallway, center top drawer.

3 Charts for patients whom I have not seen in a long time are located in the closet in the bedroom.

5 A list of patients who are on medications is located on the desktop of my computer - right side. A list of the same patients ordered by when their medications need to be renewed is in the same place.

A set of instructions and keys to my office desk and file cabinets are in my ....

Keys to my home are held by: names, phone numbers.

## Referral List

Patient

Potential Therapist

GW

AB, MSW

JA

CD, MD

TJ

EF, PhD

JM

GH, MA

JMo

IJ, PsyD

**Important Personal Papers**

Practitioners Name  
Address  
Triangle, NC 27...  
(919) ...-....

**Office**

**Closet - Large File Cabinet**

Blue Cross Blue Shield documents  
Other insurance documents

House deed

Photos of art

Car title and automobile insurance  
Disability insurance policy  
Life insurance policy  
Long-term care insurance policy

Passport/ birth certificate/ marriage certificate  
Discharge papers from military  
Information for filing office property tax-in large office desk, left drawer

Will/Power of Attorney/Living Will-an accurate copy but the most recent copy is at Attorneys, LPC (919-...-....)

Active credit card information  
Brochures and warranties on purchases

Personal information for various relatives: birth certificates, baptismal certificates, Marriage certificates and death certificates.

**Small File Cabinet - near window**

Records for more current patients.

**Computer**

The most current records on active patients. On desktop and Patient file folders. See Emergency Sheet for password or check with covering physician and children.

**In Bed Room back closet:**

Old patient records  
Old tax records (also with CPA 919-...-....)