

Caregiver Checklist

The caregiving journey can be a little easier when you know what to expect. Use this checklist to help you create a caregiving plan so you can be more prepared for the road ahead.

Begin with a conversation.

Ask what matters most to the person you're helping. For example:

- ☐ Living independently as long as possible
- ☐ Staying active with hobbies and friends
- ☐ Being financially secure
- ☐ Other _____

Identify and prioritize needs.

- ☐ Living situation
- ☐ Financial matters
- ☐ Health management
- ☐ Personal care

Find important documents.

- ☐ Social security card
- ☐ Birth certificate
- ☐ Driver's license
- ☐ Passport
- ☐ Marriage certificate/Divorce papers
- ☐ Bank records
- ☐ Insurance policies
- ☐ Military records
- ☐ Power of attorney
- ☐ Advance directives
- ☐ Living will/Do-not-resuscitate (DNR) order
- ☐ Funeral planning records
- ☐ Spouse's death certificate

Create a health information list.

- ☐ Provider names and phone numbers
- ☐ Pharmacy information
- ☐ Medication list and instructions

Identify helpful resources.

- ☐ Home care support services
- ☐ Home safety, medical equipment and modifications
- ☐ Alternate living solutions: independent living, assisted living, nursing facility
- ☐ Respite care
- ☐ Legal and financial advice
- ☐ Health care options
- ☐ Transportation
- ☐ In-home meal services
- ☐ Community activity programs

Understand end-of-life wishes.

- ☐ Hospice and palliative care planning
- ☐ Procedural orders and organ donation

Learn more and find additional topics in our Healthier Together series. Visit HSHealthierTogether.com/Caregiving