



Essential Caregiver Checklist

Caring for a loved one from near or far requires planning and coordination. This checklist provides essential steps to ensure your loved one's safety, health, and wellbeing—while helping you feel more confident and prepared in your caregiving role.

- Ask your loved ones to sign a release so you can speak to their healthcare team
- Assess home safety on your next visit including fall hazards and the presence of fire extinguishers and smoke/CO2 detectors
- Check out options for transportation, including ride-hailing apps and local faith- or community based resources
- Consider a medical alert system with fall detection that calls for help even if your loved one can't
- Create a care circle — a group of family, friends and professionals — who help you support your loved one
- Equip your loved ones cell phone with apps for easy video communication with the family and friends and reduce isolation
- Investigate local organizations that specialize in home modifications or improvements for seniors
- Know how to reach their primary care physician, specialists and local hospital
- Make sure you have up-to-date information on your family members' prescription and OTC medications
- Schedule regular phone calls or video chats with your loved one to maintain a strong connection
- Secure your own copies of legal documents like advance directives, living wills, etc.
- Support good nutrition by signing up for meal delivery services or installing an app on your loved one's phone



Every caregiving situation is unique, so adapt this checklist to fit your loved one's specific needs. The most important thing is to start somewhere and build your support system over time.