

30-Day Family Caregiver Starter Checklist

A practical first-month guide for organizing care without trying to solve everything at once.

Use the items that fit your situation. Write down who owns each next step. Bring medical, legal, financial and benefits questions to the appropriate professional.

Today and the next 72 hours

- ☐ Ask the person receiving care what matters most right now.
- ☐ Follow the care team's written instructions for urgent concerns and emergency action.
- ☐ Confirm essential medications and supplies are available.
- ☐ Confirm food, water, power, safe access and a place to sleep.
- ☐ Arrange transportation and support for the next appointment.
- ☐ Name one primary contact and one backup person.

MOST URGENT NEED

OWNER AND DUE DATE

First-month goal

By Day 30, urgent needs have an owner, the person's priorities are visible, current information has one reliable home, helpers know their roles, and a backup plan exists.

Weeks 1-2

Week 1: Stabilize

- ☐ Write down primary care, specialist, pharmacy and service contacts.
- ☐ Record after-hours numbers or instructions provided by the care team.
- ☐ Create a current medication list from available records and labels.
- ☐ Record known allergies.
- ☐ Take medication discrepancies or questions to the pharmacist or licensed care team.
- ☐ List appointments occurring in the next 30 days.
- ☐ Ask what communication permission or documentation providers require.

QUESTION FOR THE CARE TEAM

Week 2: Choose one care record

Choose one format the right people can use reliably: binder, notebook, shared document, trusted app or another accessible system.

- ☐ Preferred name and communication needs
- ☐ Current conditions and allergies as provided by the care team
- ☐ Medication list and pharmacy
- ☐ Provider, service and benefits contacts
- ☐ Appointments, transportation and open questions
- ☐ Care instructions, daily routines and sharing preferences

Weeks 3-4

Week 3: Share the work

- ☐ Assign an owner and backup for calls, appointments and family updates.
- ☐ Assign an owner and backup for groceries, rides and medication pickup.
- ☐ Make one specific request for help, including timing.
- ☐ Identify one task the primary caregiver can stop, delay or delegate.
- ☐ Contact a local aging, disability or caregiver organization if gaps remain.
- ☐ Confirm benefits and eligibility directly before relying on a service.

ONE TASK I WILL DELEGATE

Week 4: Make it sustainable

- ☐ Hold a short review of the next seven days.
- ☐ Update medications, appointments and open questions.
- ☐ Confirm who owns each next action.
- ☐ Create a 24-hour backup plan if the primary caregiver is unavailable.
- ☐ Check the caregiver's sleep, work, health appointments and essential expenses.
- ☐ Choose the date of the next monthly review.

ONE RECURRING PRESSURE TO ADDRESS

ONE SUPPORT I WILL REQUEST

Transitions and next steps

If care began after a hospital stay

- ☐ Obtain and review the written discharge instructions.
- ☐ Confirm which medication list is current.
- ☐ Confirm required equipment or supplies and delivery timing.
- ☐ Record follow-up appointments.
- ☐ Ask whom to call with questions or changes.
- ☐ Confirm which services were ordered and who will initiate contact.
- ☐ Contact the appropriate care professional when instructions conflict or are unclear.

My first-month summary

THE PERSON'S TOP PRIORITY

THE NEXT IMPORTANT DECISION

THE PERSON RESPONSIBLE

THE BACKUP CONTACT

NEXT REVIEW DATE

IMPORTANT

This checklist provides general educational information. It is not medical, legal, financial or emergency advice. Follow instructions from the person's licensed care team and contact local emergency services when urgent help is needed.