



Caregiver Readiness Checklist

A gentle, practical guide for preparing your caregiving journey.

This checklist is not a requirement. It is not a prescription. And it is not meant to overwhelm you.

It is simply a gift — a collection of tools, documents, and systems that can make your caregiving journey lighter, clearer, and more organized. Use what serves you. Leave what doesn't. Adapt it to the season you're in.

You'll notice lines beneath each section for any notes or reminders you want to add. This keeps everything in one place — not scattered in a random notebook or on sticky notes around the house. I've learned that the more organized I keep my plan to improve, the easier it becomes to actually move forward. I still fight the little notes here and there, but I'm getting better with practice.

Legal & Administrative (If needed, you may not need this now, but be prepared if you may need it later)

These items help ensure your loved one's wishes are honored, and you have the authority to advocate for them.

- Living Will
- Medical Power of Attorney
- Power of Attorney
- HIPAA Release
- End-of-life preferences or advance directives
- Copies of all legal documents stored in one accessible folder
- Contact information for attorney or legal advisor (if applicable)

Notes:

Medical Organization (The more info you have handy the quicker you get answers in emergency situations)

These tools help you stay ahead of medications, appointments, and emergencies.

- Medication tracker (daily/weekly)
 - Weekly pill organizers
 - Refill schedule and pharmacy contact
 - List of all current medications and dosages
 - Doctor and specialist contact list
 - Appointment calendar (paper or digital)
 - Emergency information sheet (allergies, conditions, hospital preference)
 - Hospital discharge papers (if applicable)
 - Medical history summary
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Notes:

Household & Daily Life (Have a plan don't get surprised by what you don't know)

These systems help keep the home running smoothly and reduce mental load.

- Password plan (secure list or password manager)
 - Bill-pay plan (auto-pay, reminders, or shared access)
 - Meal planning system (weekly plan, simple recipes, grocery list)
 - Grocery list template
 - Cleaning/maintenance rhythm
 - Safety adjustments (grab bars, lighting, rugs, mobility aids)
 - Transportation plan (appointments, errands, emergencies)
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Notes:

Caregiver Support (The value of these is beyond measure)

These items help you stay grounded, nourished, and supported.

- Personal rest plan (daily, weekly, monthly)
 - Backup caregiver list (family, friends, neighbors, church members)
 - Emotional support resources (support groups, trusted friends, spiritual mentors)
 - Therapy or counseling (if needed)
 - Spiritual support (prayer, meditation, scripture, journaling)
 - Self-care rhythm (movement, hydration, sleep, joy practices)
 - “Call list” for moments of overwhelm (people who can talk you through it)
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Notes:

Important Documents Folder (Keep this in reach at all times. Keep one under the driver's seat in your car. I keep one in my bag)

Keep these in one place — a binder, a folder, or a digital file.

- Insurance cards
 - Copies of ID (yours and theirs)
 - Medical history
 - Allergy list
 - Hospital discharge papers
 - Legal documents (POA, MPOA, Living Will)
 - Emergency contacts
 - List of medications
 - Notes from recent doctor visits
 - Copies of bills or financial documents (if you manage them)
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Notes:

Final Note to the Caregiver

This checklist is not meant to be completed in a day. It is not meant to add pressure. It is meant to give you clarity, confidence, and peace.

Caregiving is a journey — one that requires preparation, compassion, and support. Let this checklist be a companion, not a burden. Let it serve you, not overwhelm you. Let it remind you that you are doing sacred work, and you deserve tools that make the path lighter.

You are not alone. You are becoming. And you are doing beautifully.