Complete Medical History Worksheet

Gather the history · identify gaps · keep the record current

A practical caregiver record for bringing health history, current care information, and the location of important records together.

Background · diagnoses · the person's priorities

Build the record from what you know—and mark what you do not.

Use current records when available. Write "unknown" or "approximate" rather than guessing, and keep original reports with this worksheet. [1]

THIS HISTORY IS FOR (NAME)

PRIMARY CAREGIVER

DATE OF BIRTH

LAST REVIEWED / UPDATED

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1 CURRENT AND PAST HEALTH CONDITIONS [1]

CONDITION / DIAGNOSIS	WHEN IDENTIFIED	CLINICIAN / RECORD SOURCE

2 ADD THE DETAILS A NEW CARE TEAM SHOULD KNOW

PRIMARY CARE CLINICIAN / PHONE

MAIN SPECIALIST / PHONE

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CURRENT CONCERNS / WHAT MATTERS MOST TO THE PERSON

Include who reported each condition if it has not been confirmed in a medical record. Use another copy of a working page when you need more rows.

Allergies · reactions · current medicines

3 ALLERGIES AND REACTIONS [1]

Record the substance and what happened. Mark “no known allergies” only when that information has been checked; otherwise write “unknown.”

SUBSTANCE / MEDICINE	REACTION / WHEN	SOURCE / CONFIRMED BY

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4 MEDICINES, SUPPLEMENTS AND CURRENT LIST [1]

Include nonprescription products. Copy current instructions; this page does not authorize treatment changes. Attach a complete current medication list if needed.

NAME / STRENGTH	DOSE / HOW TAKEN	PRESCRIBER / VERIFIED DATE

FULL MEDICATION LIST LOCATION / DATE

PHARMACY / PHONE

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Health events · family history · supporting records

5 SURGERIES, HOSPITAL STAYS AND MAJOR EVENTS [1]

DATE / APPROXIMATE YEAR	EVENT / PROCEDURE / REASON	FACILITY / RECORD LOCATION

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6 FAMILY HEALTH HISTORY, WHEN KNOWN [2]

Use the relationship rather than a relative's full name. An unknown history is a gap to note, not a fact to invent.

RELATIONSHIP	CONDITION / AGE AT ONSET	KNOWN SOURCE / QUESTIONS

WHERE TO FIND VACCINATION, SCREENING, LAB AND IMAGING RECORDS

Daily context · missing information · next review

7 EVERYDAY NEEDS AND PREFERENCES

COMMUNICATION / LANGUAGE / HEARING

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MOBILITY / EQUIPMENT / ASSISTANCE

IMPORTANT ROUTINES, LIVING SITUATION OR SUPPORT NEEDS

EXISTING CARE INSTRUCTIONS / WHERE THE CURRENT PLAN IS KEPT

8 CLOSE THE INFORMATION GAPS

MISSING RECORD / QUESTION	WHO WILL CHECK / BY WHEN

Keep this worksheet private. Share relevant information with the person's permission or appropriate authority, and confirm conflicting details with the care team.

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Sources informing this resource · Original worksheet prompts by TCC

[1] MedlinePlus — Personal Health Records

[2] MedlinePlus — Creating a Family Health History

[3] National Institute on Aging — How To Prepare for a Doctor's Appointment

Sources checked September 10, 2026. Use the person's individualized care instructions.

Everything about your loved one's care, organized in one place.

The Caregiving Concierge™ helps families organize appointments, providers, medications, documents, schedules, transportation details, and other important care information in one secure workspace.

https://www.thecaregivingconcierge.com/library

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