Medication Management Checklist

Keep Medication Information Clear, Current, and Easy to Share

A practical caregiver tool for organizing medications, refills, recent changes, and questions for the care team.

A free resource from

The Caregiving Concierge™

by AdVantage Digital

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Medication Management Checklist

Print it · check off as you go · keep it handy

A calm, organized way to keep your loved one's medication information current, easy to find, and easier to track.

Managing medications is one of the heaviest parts of caregiving - multiple prescriptions, different times of day, refills that sneak up on you, and the worry of missing an important detail. This checklist helps you build a clear written system, step by step. Work through it once to get organized, then come back whenever something changes. **Nothing here is saved to a server - it's yours to print, check off, and share with anyone who helps.**

THIS CHECKLIST IS FOR (NAME)

PRIMARY CAREGIVER

PREFERRED PHARMACY & PHONE

DATE STARTED / LAST UPDATED

1 WHY A MEDICATION SYSTEM MATTERS

- **It helps reduce confusion.** A written medication list gives everyone one place to check what is being taken, when, and why.
- **It saves you mental energy.** A written system means you're not holding every dose, instruction, and refill date in your head.
- **It keeps everyone on the same page.** Family members, aides, doctors, and pharmacists can work from the same current information.
- **It makes appointments and unexpected care needs easier.** An up-to-date medication list gives healthcare professionals important information when they are reviewing care.

FREE CAREGIVER RESOURCE

How to use this checklist: Start with Step 2 to build one complete, current medication list - that master list is the foundation for everything else. Then set up the daily routine, refill tracking, review notes, and safety habits in Steps 3-7. Come back to it any time something changes.

Important: This resource is provided for organization and educational purposes only and does not replace instructions or advice from a doctor, pharmacist, or other qualified healthcare professional. Always confirm medication questions, missed-dose instructions, and medication changes with the appropriate healthcare professional.

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Medication Management Checklist

Build the list · set the routine

Last updated: .....

2 BUILD ONE COMPLETE MEDICATION LIST

- [ ] Gather every medication and health product - prescriptions, over-the-counter medicines, vitamins, supplements, eye drops, creams, inhalers, and other products used regularly or as needed.
- [ ] For each one, record the **name, strength or dose, form, what it's for, who prescribed it, and how & when it's taken.**
- [ ] Record known medication allergies or previous reactions as they have been documented or described to you.
- [ ] Keep the current list somewhere easy to access, and consider keeping a second copy with emergency information or with you when attending appointments.
- [ ] Update the list whenever a medication is started, stopped, or changed - then replace older copies so everyone is working from the current version.

MEDICATION	DOSE / FORM	WHAT IT'S FOR	HOW & WHEN	PRESCRIBER	REFILL / NOTES

Tip: Take a clear photo of each medication label as a backup, and photograph this filled-in list so you have the current information with you.

3 SET UP A DAILY ROUTINE YOU CAN TRUST

- [ ] **If appropriate for the medications,** use a weekly pill organizer (with AM/PM compartments if needed). Ask the pharmacist if you're unsure whether any medication should remain in its original packaging.
- [ ] Set alarms, phone reminders, or another routine cue for scheduled medication times.
- [ ] Follow the label and care team's instructions about food, timing, storage, or spacing from other medicines.
- [ ] Keep a simple **"taken today"** log when more than one person may help with medications.
- [ ] **Never crush, split, or open a capsule without checking with the pharmacist first.** Some medications should not be altered.
- [ ] Ask the doctor or pharmacist what to do if a dose is missed, and write down those instructions so no one has to guess in the moment.

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Medication Management Checklist

Changes · reactions · questions

Last updated: _____

MEDICATION CHANGES & REVIEW NOTES

Use this page to capture changes you were told about by the care team or pharmacist. Update the master medication list on Page 2 after a change is confirmed.

MEDICATION	WHAT CHANGED	DATE	PROVIDER / PHARMACIST	NOTES
	Started / stopped / dose or schedule changed			

KNOWN MEDICATION ALLERGIES / PREVIOUS REACTIONS

MEDICATION / SUBSTANCE	REACTION	NOTES

Medication review / reconciliation: Reviewed with: ☐ Doctor ☐ Pharmacist ☐ Hospital / discharge team ☐ Other Date: _____

QUESTIONS FOR THE DOCTOR OR PHARMACIST

Write questions down as they come up. Bring this page to an appointment or pharmacy conversation so you don't have to remember them later.

Medication / question: _____

Medication / question: _____

Medication / question: _____

Medication / question: _____

Medication / question: _____

After a review: If the care team confirms that a medication was added, stopped, or changed, update the master list and replace older copies.

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Medication Management Checklist

Refills · storage · safe handling

Last updated: .....

4 STAY AHEAD OF REFILLS & PHARMACY

- [ ] **When practical, using one pharmacy** can make it easier for the pharmacist to review the complete prescription list.
- [ ] Ask whether 90-day supplies, automatic refills, mail-order, or delivery are available and appropriate for the prescription and insurance plan.
- [ ] Ask whether the pharmacy offers **medication synchronization** if coordinating multiple refill dates would make things easier.
- [ ] **Plan refills early enough to avoid running out,** especially when a prescription may require a provider renewal or prior authorization.
- [ ] Keep the pharmacy's phone number, hours, and any after-hours contact information you may need with the medication list.

5 STORE & HANDLE MEDICATIONS SAFELY

- [ ] **Follow the medication label or pharmacist's storage instructions.** Many medicines should be kept in a cool, dry place away from excess heat and moisture.
- [ ] Keep medications in their original labeled containers unless the pharmacist confirms they can be placed in an organizer.
- [ ] If memory loss or confusion makes medication access unsafe, consider secure storage and discuss the safest setup with the care team or pharmacist.
- [ ] Check expiration dates regularly and separate expired or discontinued medications so they are not used by mistake.
- [ ] **Use a drug take-back location or mail-back option** for unused or expired medications when available. If one isn't available, follow the medication label or current FDA disposal guidance. Do not flush medications unless specifically directed.
- [ ] If two products look like they may contain the same medication, or a brand and generic name seem similar, **ask the pharmacist to review them.**

Good to know: The DEA sponsors National Prescription Drug Take Back Day, and many pharmacies and law-enforcement locations offer year-round collection options. Your pharmacist can help you locate an appropriate disposal option.

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Medication Management Checklist

Care team · questions · urgent concerns

6 WORK WITH DOCTORS & PHARMACISTS

- [ ] Bring the **up-to-date medication list** to appointments, including prescription medicines, OTC products, vitamins, and supplements.
- [ ] Periodically - and especially after major medication changes or a hospital stay - ask whether a medication review would be helpful. If asked, bring medication bottles or packaging.
- [ ] For a new prescription, ask: **What is it for? How and when should it be taken? What side effects or warning signs should we watch for? How long is it expected to be used?**
- [ ] After a hospital stay, ask for a **medication reconciliation** - compare the discharge list with the prior list and confirm what changed.
- [ ] Use trusted resources for general education, but bring questions about symptoms, dosing, side effects, or interactions to the doctor or pharmacist.

7 WATCH FOR PROBLEMS & KNOW WHAT TO DO

- [ ] Ask the doctor or pharmacist what side effects or warning signs to watch for when a medication is started or changed.
- [ ] Contact the care team or pharmacist about new or concerning symptoms and ask what should prompt urgent or emergency care.
- [ ] Ask what to do if a dose is missed, and record those instructions. **Do not guess or double a dose unless specifically instructed by a healthcare professional.**
- [ ] Share the current medication list with the people who help with care, as appropriate, so everyone can refer to the same information.

POSSIBLE POISONING OR MEDICATION OVERDOSE
In the U.S., call Poison Control at **1-800-222-1222** for immediate guidance.

CALL 911 IMMEDIATELY
If the person collapses, has a seizure, has trouble breathing, or cannot be awakened.

DOCTOR / PRESCRIBER & PHONE

PHARMACY & PHONE

KNOWN ALLERGIES / REACTIONS

POISON CONTROL
1-800-222-1222

You're doing the hard, invisible work. Keeping medication information organized is one of the many details caregivers carry every day. A simple, written system can make that information easier to manage, share, and update - and take a little of it out of your head.

Everything about your loved one's care, organized in one place.
The Caregiving Concierge™ helps families organize medications, appointments, providers, documents, schedules, and other important care information in one secure workspace. **Scan to learn more at thecaregivingconcierge.com.**

SCAN TO LEARN MORE