The Caregiving Essentials Checklist

What to Gather Before You Need It

A practical way to gather the information your family may need later.

A free resource from

The Caregiving Concierge™

by AdVantage Digital

thecaregivingconcierge.com

Why this checklist exists

Most families don’t gather this information until a crisis forces them to — in an ER waiting room, on hold with a pharmacy, or digging through a filing cabinet at 2 a.m. trying to find a Medicare card.

This checklist changes that. Work through it one section at a time — over coffee with your loved one, on a Sunday afternoon, at whatever pace works. Every box you check is one less thing to scramble for later. You don’t have to finish it in a day. You just have to start.

> ***How to use it:*** *print it out, check off what you already have, circle what’s missing, and use the boxes under each section to note where each item lives and who can reach it. “We have it but nobody knows where” counts as missing.*

Care at a Glance

The essentials anyone stepping in should be able to find in seconds.

Legal name / preferred name: .....

Date of birth: .....

Home address: .....

Primary contact name: .....

Primary contact relationship: .....

Primary contact phone: .....

Preferred language & communication needs: .....

Mobility aids & level of assistance: .....

Hearing, vision, or cognitive considerations: .....

Checklist last updated: ___ / ___ / ______

1 Medical Essentials

The information hospitals and pharmacies will ask for first.

- [ ] Complete, current medication list — names, doses, times, and prescribing doctor for each
- [ ] Known allergies and past reactions (medications, foods, latex, contrast dye)
- [ ] List of diagnoses and ongoing conditions, in plain language
- [ ] Every doctor and specialist — name, practice, and phone number
- [ ] Preferred pharmacy (and any second pharmacy that also fills prescriptions)
- [ ] Current immunization record, including vaccines recommended for the person's age, health conditions, and medical history
- [ ] Dates of recent hospitalizations, surgeries, and procedures
- [ ] Medical devices or implants, including pacemaker information
- [ ] Oxygen, dialysis, home health, hospice, or infusion providers
- [ ] Baseline mobility and cognitive status
- [ ] Preferred method of communication

✦ *Photograph the actual pill bottles — labels capture details memory misses.*

KEEPING TRACK

Where these items are kept: .....

Who has access: .....

Last reviewed: ___ / ___ / _____

Notes or missing items: .....

2 Legal Documents

The paperwork that lets you act on your loved one's behalf when it matters.

- [ ] Durable power of attorney (financial)
- [ ] Medical power of attorney / healthcare proxy
- [ ] Advance directive or living will
- [ ] HIPAA release forms on file with each doctor, so providers can talk to you
- [ ] Will or trust — you don't need the contents, just the location and the attorney's name
- [ ] DNR or POLST form, when medically appropriate and chosen with the healthcare team, plus the location of the current signed copy
- [ ] Primary and alternate agents named in each document
- [ ] Date signed, and whether the original or a copy is available
- [ ] Attorney contact information
- [ ] Confirm that current documents meet your state's signing, witnessing, and notarization requirements

✦ *Documents locked in a safe no one can open don't count. Note locations and access below.*

KEEPING TRACK

Where these items are kept: .....

Who has access: .....

Last reviewed: ___ / ___ / ______

Notes or missing items: .....

3 Financial & Insurance

What keeps the household running if your loved one can't manage it for a while.

- [ ] Medicare and/or insurance cards — copies of front and back
- [ ] Supplemental, long-term care, and life insurance policies — carrier and policy numbers
- [ ] List of monthly bills and how each is paid (autopay, check, online)
- [ ] Banks and account types — institutions only; store account numbers securely, never on paper lists
- [ ] Income sources: Social Security, pensions, annuities, retirement withdrawals
- [ ] Name and number of any accountant, financial advisor, or attorney
- [ ] Safe deposit box — which bank, and who has access
- [ ] Property obligations — mortgage or lease, property taxes, HOA fees, and any vehicle loans

✦ *Watch the mail for a month — paper statements reveal accounts nobody mentioned.*

KEEPING TRACK

Where these items are kept: .....

Who has access: .....

Last reviewed: ___ / ___ / _____

Notes or missing items: .....

4 Emergency Readiness

The grab-and-go layer. Minutes matter here.

- [ ] An emergency card for wallet and fridge: conditions, medications, allergies, contacts
- [ ] Emergency contact list — family in call order, plus one nearby non-family backup
- [ ] Backup care plan if the primary family caregiver is unavailable
- [ ] Preferred hospital, and which hospital the doctors are affiliated with
- [ ] A trusted neighbor who has a key and knows the family's numbers
- [ ] Location of insurance cards, med list, and legal documents — findable in under five minutes
- [ ] Plan for pets if your loved one is unexpectedly hospitalized
- [ ] Power-outage plan for medical devices or refrigerated medication
- [ ] Evacuation and accessible-transportation plan
- [ ] Small go-bag with medication list, chargers, hearing-aid batteries, glasses, and mobility supplies
- [ ] Current photo and identification copy, especially when memory loss or wandering is a concern

✦ *Keep emergency information in a clearly visible, consistent location, such as a labeled pouch on the refrigerator. Ask your local fire or EMS department whether it offers a File of Life program.*

KEEPING TRACK

Where these items are kept: .....

Who has access: .....

Last reviewed: ___ / ___ / _____

Notes or missing items: .....

5 Home & Daily Life

The routines that keep everything else steady.

- [ ] Daily routine notes: meals, medication times, mobility needs, sleep patterns
- [ ] Who has house keys, and any alarm or garage codes (stored securely)
- [ ] Utility providers and account status — electric, gas, water, phone, internet
- [ ] Regular services: lawn care, housekeeping, meal delivery, transportation
- [ ] Vehicle information: registration, insurance, and where the spare key lives
- [ ] Names and numbers of neighbors, clergy, and close friends who check in
- [ ] Food preferences and dietary restrictions
- [ ] Fall risks and transfer assistance
- [ ] Toileting, bathing, dressing, and other daily-care needs
- [ ] Comfort routines when the person is anxious or confused

✦ *Small preferences matter most on hard days — note the ones only family would know.*

KEEPING TRACK

Where these items are kept: .....

Who has access: .....

Last reviewed: ___ / ___ / ______

Notes or missing items: .....

6 Digital Life & Account Access

The modern layer families forget until they're locked out.

- [ ] Authorized device access plan for an emergency — how to unlock the phone or tablet when it's needed
- [ ] Account-recovery contacts and two-factor authentication recovery methods
- [ ] Digital legacy plan for access after death, where supported (e.g., Apple Legacy Contact, Google Inactive Account Manager)
- [ ] Email account access plan — password resets for everything else flow through email
- [ ] A password manager with emergency access set up — never a list taped to the desk
- [ ] Online portals in use: banking, Medicare.gov, patient portals, pharmacy accounts
- [ ] Subscriptions and memberships that bill automatically
- [ ] Social media accounts and your loved one's wishes for them

✦ *The goal isn't collecting passwords — it's making sure access is possible when needed.*

KEEPING TRACK

Where these items are kept: .....

Who has access: .....

Last reviewed: ___ / ___ / _____

Notes or missing items: .....

7 The Personal Side

The conversations that are easier to have before you need the answers.

- [ ] Your loved one’s wishes for care if they can’t speak for themselves — in their own words
- [ ] Funeral or memorial preferences, and any pre-paid arrangements
- [ ] The life story only they can tell — record it, even just voice memos over coffee
- [ ] Family photos, recipes, and keepsakes — where they are and who should have them
- [ ] Anything they’ve been meaning to say, give, or resolve
- [ ] What “a good day” looks like to them — so every caregiver can aim for it
- [ ] Spiritual, cultural, or religious preferences
- [ ] Music, television, hobbies, or routines that bring comfort
- [ ] People the loved one wants contacted during serious illness
- [ ] Things that help turn a difficult day around

✦ *These are the items families most often wish they’d gathered sooner. Start gently. Start anywhere.*

My next three steps

You don’t have to do it all. Name the three things you’ll tackle first.

1. .....
2. .....
3. .....

Ready to keep it all organized?

The Caregiving Concierge™ puts everything on this checklist — medications, documents, finances, emergency info, even the life story — in one secure place your whole family can share, with scheduling, reporting, and a login for every family member, each with the right level of access.

Founding Subscriber enrollment opens September 2026

Join the waitlist for early access and Founder Pricing. Already joined? You're all set — share this checklist with another family caregiver who may need it.

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thecaregivingconcierge.com

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This checklist is for general organizational purposes and isn't legal, medical, or financial advice. Guidance such as advance directives, POLST forms, and vaccine recommendations varies by state and by individual circumstance — confirm specifics with an attorney licensed in your state and with your loved one's healthcare team.