

Care Plan Checklist



Personal Information

- full name, dob, social security number
- current address and phone number
- list of emergency contacts
- key family members

Medical Information

- primary care physician's name
- list of specialists
- current diagnosis
- list of daily medical needs
- relevant medical history
- list of medications
- allergies

Insurance and Financial information

- copies of insurance cards (medical, dental, vision, prescription)
- list of insurance providers, policy numbers and coverage details
- legal documents (power of attorney, health care proxies, living wills)

Care Routine

- | | |
|--|--|
| <input type="checkbox"/> daily care schedule: meals, bathing, dressing, and other essential activities | <input type="checkbox"/> cognitive or emotional support activities |
| <input type="checkbox"/> meal plan and dietary restrictions | <input type="checkbox"/> rest and sleep rituals |
| <input type="checkbox"/> physical therapy, OT, PT, Speech, exercise routines | <input type="checkbox"/> nighttime routines |

Personal Preferences

- | | |
|--|---|
| <input type="checkbox"/> routines, foods, activities and hobbies | <input type="checkbox"/> preferences for social interactions or quiet time |
| <input type="checkbox"/> spiritual or religious practices | <input type="checkbox"/> special items or routines that bring comfort (books, music, apps etc.) |

Back up care/Respite

- | |
|---|
| <input type="checkbox"/> names and contact info for backup caregivers or respite care |
|---|

Emergency Plan

- | | |
|--|---|
| <input type="checkbox"/> emergency contacts for doctors, family members, and neighbors | <input type="checkbox"/> safety precautions in the home (eg. fall prevention, fire escape plan) |
| <input type="checkbox"/> instructions for handling medical emergencies (who to call first, hospital preferences) | <input type="checkbox"/> information on medical alert systems (if used) |

Regular Updates and Reviews

- schedule for reviewing and updating the plan (every 6 months or as needed)
- update medical and financial records
- schedule regular check-ins with healthcare professionals