



The First-Time Caregiver

Emergency Start Checklist

The First Steps to Take When a Loved One Needs Care

Becoming a caregiver often happens suddenly.

Many people find themselves responsible for an aging parent, spouse, or loved one without preparation or guidance.

This free checklist will help you quickly identify the most important first steps to take so you can begin organizing caregiving responsibilities with clarity and confidence.

Inside this guide you will learn how to:

- ✓ Gather critical medical information
- ✓ Organize medications and healthcare contacts
- ✓ Identify legal and financial documents
- ✓ Create a basic caregiving support system
- ✓ Start managing day-to-day care responsibilities

Taking these early steps can dramatically reduce stress and help you feel more in control during an overwhelming time.

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Welcome

If you are reading this, you may have recently become responsible for helping care for a parent, spouse, or loved one.

Many caregivers step into this role unexpectedly — often after a medical diagnosis, hospital stay, or gradual decline in health.

The early days of caregiving can feel overwhelming.

There are medical decisions to make, information to organize, and responsibilities that may suddenly fall on your shoulders.

This checklist will help you focus on the most important first steps so you can begin creating structure around your caregiving responsibilities.

You do not need to complete everything at once.

Simply use this checklist as a guide to begin organizing the essentials.

Caregiver Starter Checklist

Step 1: Gather Essential Medical Information

- Primary care physician name and phone number
- Specialist doctors involved in care
- Current medical diagnoses
- Current medications and dosage schedule
- Pharmacy name and contact information
- Health insurance provider and policy number
- Medicare / Medicaid information (if applicable)

Notes:

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Step 2: Organize Important Documents

- Identification documents
- Insurance cards
- Medication lists
- Medical history records
- Emergency contact list
- Living will or advance directive
- Durable power of attorney documents

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Daily Care Organization

Step 3: Evaluate Daily Care Needs

- Transportation to medical appointments
- Medication reminders or management
- Assistance with meals or nutrition
- Household safety concerns
- Fall prevention adjustments in the home
- Personal care assistance (bathing, dressing)

Notes:

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Step 4: Build a Caregiving Support System

- Identify family members who can help
- Identify trusted friends or neighbors
- Locate local caregiver support groups
- Research home care services if needed
- Identify emergency backup caregivers

Notes:

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Next Steps

Your Next Steps

Starting the caregiving journey can feel overwhelming, but taking small steps to organize information and support can make the process far more manageable.

Many caregivers find that having simple tools and checklists dramatically reduces stress and helps them feel more confident managing responsibilities.

If you found this checklist helpful, additional caregiving resources are available in the Complete Family Caregiving Library.

These guides provide step-by-step help for:

- ✓ Managing medical care
- ✓ Understanding Medicare and healthcare systems
- ✓ Organizing medications and appointments
- ✓ Preventing caregiver burnout
- ✓ Supporting aging parents with chronic conditions

Learn more at:

www.Cathy-Wynne.com