



Ultimate Caregiver Checklist

Being a caregiver can be really overwhelming. There are so many forms and agencies, it can be difficult to figure out where to start. That is why we have created this printable Ultimate Caregiver Checklist. This document includes:

- A checklist of must-haves for every family caregiver.

*Note: This list will grow and change as government policies change and new services become available. To make sure you never miss any update, opt-into our email list! (We promise to only send you the really important stuff!)



- Get a diagnosis
- Ask about and locate [Living Will or Advanced Directive](#)
- Get [Power of Attorney](#)
- Locate or request all medical records (including vaccinations, scans, x-rays, etc.)
- Breathe
- Get Organized
 - List of emergency contacts (doctors, immediate family members, involved neighbors)
 - Make copies
 - Binders/Notebooks for medical records (separate by physician, put in chronological order)
 - Real* day planner and/or calendar to keep track of appointments
 - Pill dispensers (Note: If your loved one suffers from dementia, they may not know the day of the week or time of day, so you still have to watch to make sure they take their medicine.)
- Breathe
- Meet with *necessary* family members (immediate family members and those actively involved in your loved one's life and care)
 - Divide and delegate responsibilities
 - Who will transport loved one to doctors?
 - Who will attend doctors appointments?
 - Who will be contact person for doctors?
 - Who will stay with them during the day?
 - Who will stay with them during the night?
 - Who will help them with bathing?
 - Who will handle finances (bank account, bills, etc.)?
 - Who will grocery shop?
 - Who will do housework?
 - Who will do yard work?
 - Who will cook?
 - Who will manage medication (ordering, refilling, and giving to your loved one)?
- Determine long-term financial reality
 - Do they have enough money for¹:
 - Home Health Aides (up to \$32,760 per year)?
 - Assisted Living (up to \$42,000 per year)?

¹Source: [Paying for Senior Care](#)



- Nursing Home (at least \$81,000 per year)?
- Memory Care (at least \$84,000 per year)?
- Palliative Care (varies)
- Hospice (varies)
- Apply for SSDI
 - Make sure you have everything on the official [Social Security Administration checklist](#)
 - Complete [SSDI application](#) as soon as possible (Note: In many instances, people are denied the first time. Don't be discouraged. If at first you don't succeed, try, try again!)
 - You'll need a letter from their diagnosing physician
- Apply for [Medicare](#)²
 - Learn about the different parts of Medicare
 - Find out when your loved one can get Medicare
 - Decide if they need Part A *and* Part B
 - Choose their coverage
 - Sign up for Medicare (unless they [get it automatically](#))
 - Get **FREE** personalized health insurance counseling from your local [State Health Insurance Assistance Program \(SHIP\)](#)
- Apply for Medicaid
 - First, find out if [your state is expanding Medicaid](#) and learn what that means for you.
 - If your state is expanding Medicaid, [use this chart](#) to see what you may qualify for based on your income and family size.
 - Even if you were told you didn't qualify for Medicaid in the past, you may qualify under the new rules. You can see if you qualify for Medicaid 2 ways:
 - [Visit your state's Medicaid website](#). Use the drop-down menu at the top of this page to pick your state. You can apply right now and find out if you qualify. If you qualify, coverage can begin immediately.
 - [Fill out an application in the Health Insurance Marketplace](#). When you finish the application, we'll tell you which programs you and your family qualify for. If it looks like anyone is eligible for Medicaid and/or CHIP, we'll let the state agency know so you can enroll.³
- Keep on breathing...

² Source: [Medicare.gov](#)

³ Source: [US Department of Health & Human Services](#)

