

First-Steps Checklist

A list of everything worth organizing is not the same as a list of things you have to finish. Work down it in pieces, in whatever order fits the week you're having. A partly finished checklist is enormously better than none, and no one is grading this.

If you do nothing else this month

These three take the least time and prevent the most damage. The rest of this list can wait for a week when you have more in you.

- ☐ **Write down every medication** — prescriptions, over-the-counter drugs, and supplements, with dosages. This is the item most often needed urgently and most often wrong.
- ☐ **Ask where the important documents are.** Not to move them. Just to know.
- ☐ **Find out whether a power of attorney and health care proxy exist.** If they don't, this is the one task on the whole list that expires.

Build the care hub

- ☐ Choose one place for everything — a binder, a secure shared folder, or a care-coordination app. Pick the format the least technical person in your family will actually open.
- ☐ Medical information: diagnoses, surgeries, hospitalizations, ongoing conditions
- ☐ Medication list: every prescription, over-the-counter drug, and supplement, with dosages and purpose
- ☐ Doctors and pharmacies: names, specialties, phone numbers, which pharmacy holds the prescriptions
- ☐ Insurance: Medicare, any supplemental or Advantage plan, long-term care policy, plan numbers
- ☐ Appointments: what's upcoming, and who is taking them
- ☐ Family responsibilities: who has agreed to do what
- ☐ Legal-document locations: where the will, power of attorney, advance directive, and deed actually are
- ☐ Bills and recurring expenses: what's due, when, and how it's paid
- ☐ Emergency contacts: family, neighbors, the doctor's after-hours line
- ☐ Home and pet information: alarm code, water shutoff, the dog's food and vet

Keep it secure — this is a complete profile of a vulnerable adult. And build it with your parent where you can, not about them.

Make the one-page emergency summary

- ☐ Full name and date of birth
- ☐ Medical conditions
- ☐ Medications and dosages
- ☐ Allergies
- ☐ Emergency contacts
- ☐ Health care decision-maker

- ☐ Doctors
- ☐ Insurance information
- ☐ Preferred hospital
- ☐ Location of advance directives
- ☐ Print three copies: one at home somewhere obvious, one with the primary caregiver, one in an emergency bag by the door
- ☐ Set a recurring calendar reminder to update it

An emergency summary listing a medication your parent stopped eight months ago is worse than no summary at all.

Divide the responsibilities

- ☐ Medical coordinator
- ☐ Appointment coordinator
- ☐ Medication manager
- ☐ Financial coordinator
- ☐ Home-maintenance coordinator
- ☐ Meal and grocery coordinator
- ☐ Social and companionship coordinator
- ☐ Backup emergency contact
- ☐ Give every role a primary person **and** a backup
- ☐ Write the assignments down somewhere everyone can see them
- ☐ Give distant family real remote jobs: insurance calls, bill payment, refills, research

Match the job to the person, not to birth order. And treat companionship as a real assignment — a parent whose only visitors come to count pills is being managed, not loved.

Set up access before you need it

- ☐ Sign proxy-access forms for each medical portal — privacy law means providers generally need written permission before releasing information to you, and access rarely transfers between practices
- ☐ Add a trusted contact to financial accounts (notification, not control — a low-friction first step)
- ☐ Confirm caregivers know where documents are stored — the actual safe combination, the lawyer's actual number
- ☐ Arrange access to the home: a key with family or a trusted neighbor, or a lockbox
- ☐ Record alarm, garage, and lockbox codes — stored securely, and separately from the address

The part that expires

- ☐ Durable power of attorney for finances — signed
- ☐ Health care proxy — signed
- ☐ Advance directive — signed, with copies where someone can find them

These have to be signed while your parent still has the capacity to sign them. After that, the only route is guardianship: slow, expensive, public, and hard on everyone. Families don't delay this out of negligence. They delay because signing means admitting where this is heading. But the window closes quietly, and nobody announces it.

Free help finding local services: Eldercare Locator — eldercare.acl.gov or 800-677-1116. In-home help, transportation, home modifications, and guidance on paying for care.

Free printable worksheets for coordinating responsibilities, tracking medications, checking the home for safety hazards, and gathering documents: National Institute on Aging — nia.nih.gov/health/caregiving/caregiver-worksheets

Notes

Names, phone numbers, questions for the next appointment, things you keep meaning to ask.
