



New Caregiver — Getting Started Checklist

A calm first-steps checklist for when you're suddenly, or newly, helping someone you love.

You don't have to solve everything today. This is about getting oriented, not doing it all at once. Start with what's in front of you, and let the rest wait.

What does my loved one need help with right now?

The most pressing needs this week:

Who else is involved?

☐ Family members who can help

☐ Friends or neighbors

☐ Existing paid helpers or aides

☐ A doctor or care team already in place

Important contacts to gather

☐ Primary doctor

☐ Pharmacy

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- ☐ Preferred hospital

- ☐ Close family / emergency contact

- ☐ Any existing care manager or agency

Medications & appointments to locate

- ☐ Current medication list (or the bottles themselves)
- ☐ Upcoming appointments
- ☐ Insurance / Medicare information

Legal & financial documents to identify

You only need to locate these for now — not act on them.

- ☐ Power of attorney (if any)
- ☐ Healthcare directive / living will (if any)
- ☐ Where important documents are kept

Safety concerns to notice

- ☐ Falls or unsteadiness
- ☐ Medication mix-ups
- ☐ Home hazards
- ☐ Driving concerns

Questions I need answered

What can wait?

Naming what does NOT need attention today is just as important.

What support do I need?

For yourself — help, rest, information, or someone to talk to:

Be kind to yourself

Caring for someone is a real job, and asking for help is part of doing it well — not a sign you're failing. Protect a little time and energy for yourself from the start.

Prepared with Age Dignity · This Age Dignity worksheet offers general educational organization and conversation support. It is not a diagnostic tool, medical screening, or a substitute for advice from a qualified professional. Bring your notes to a trusted clinician, advisor, or counselor for guidance specific to your situation.