



FOR FAMILY CAREGIVERS

The Caregiver's Companion

A practical planner for caring for loved ones

Organize the details. Make room for what matters.



Best lives are lived at home.

THE TOWN SAGE

thetownsage.com

Welcome to your caregiving companion

A calmer place to keep the information, decisions, and everyday details of care.

How to use this planner

Start with the Care Snapshot and Important Contacts. Complete only the sections you need today. Print additional copies of tracking pages as your needs change.

A note about privacy

This planner may contain sensitive personal and health information. Store completed copies securely, share only with trusted people, and avoid leaving them in public spaces.

A note about care

This planner supports organization and conversations. It does not replace professional medical, legal, or financial advice. In an emergency, contact local emergency services.

A gentle reminder

You do not have to do everything at once. Progress can look like one phone call, one updated medication list, or one moment of rest.

Start here:

1. Care Snapshot 2. Contacts 3. Medication List

Planner index

Print one copy of the reference pages and repeat the trackers as needed.

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Care snapshot

A quick overview to share with trusted members of the care team.

Loved one's full name

Preferred name / pronouns

Date of birth

Address

Preferred phone / communication

Primary caregiver and phone

Primary care provider

Health insurance company (no full policy numbers)

Most important care needs today

What helps this person feel safe, comfortable, and respected?

Important contacts

Keep names and numbers in one place. Update when something changes.

Name / role	Phone	Notes

Care team and providers

Record clinicians, pharmacies, home care services, and other trusted support.

Provider / organization	Specialty / purpose	Phone / location

Health history and allergies

Use this as a reference for appointments, not as a substitute for medical records.

Conditions / diagnoses and relevant dates

Allergies and reactions (medication, food, environmental)

Prior procedures / hospitalizations / other considerations

Medication list

Confirm medications and changes with a licensed clinician or pharmacist.

Medication / strength	When / how taken	Purpose / notes

Pharmacy and phone

List last reviewed with / date

Appointments and questions

Prepare for each visit and capture the most important concerns.

Appointment date / time

Provider / location / transportation

Top three questions to ask

Symptoms, changes, or concerns to mention

Items to bring / prepare

Appointment notes

Document recommendations and clarify next steps with the care team.

Date / provider / reason for visit

What we learned / care instructions

Follow-up actions, owners, and due dates

Daily care log

Use one page per day when close monitoring or coordination is helpful.

Date / caregiver on duty

Time	Care / observation / activity	Follow-up needed

Notes on mood, comfort, meals, hydration, sleep, or mobility

Weekly care schedule

A simple overview of visits, routines, transportation, and check-ins.

Day	Plans / appointments / care coverage

Care tasks and delegation

Make responsibilities visible so that no one has to carry every task alone.

Task / next action	Person responsible	Due / status

Home safety checklist

Use these prompts to identify items to discuss with qualified professionals.

Walkways and lighting

- ☐ Clear walking paths
- ☐ Good lighting and accessible switches
- ☐ Secure rugs / cords

Bathroom and mobility

- ☐ Stable handholds where appropriate
- ☐ Non-slip bathing surfaces
- ☐ Mobility aids reviewed for fit

Kitchen and household

- ☐ Food and water accessible
- ☐ Smoke / carbon monoxide alarms checked
- ☐ Medication storage reviewed

Emergency readiness

- ☐ Emergency contacts accessible
- ☐ Exit plan discussed
- ☐ Home address visible for responders

Safety concerns / action owner / date

Emergency information

Store securely. Share this page only with appropriate trusted caregivers.

Loved one's name and address

Emergency contact / relationship / phone

Alternate emergency contact

Preferred hospital (if applicable)

Important allergies / medical alerts

Primary clinician / phone

Where to find current medication list

Where to find legal / care documents

Additional instructions / considerations

Documents and access inventory

Record where important documents are kept; do not write passwords here.

Document / record		Where stored / who to contact	

People authorized to access information / questions to resolve

Expenses and reimbursements

Track care-related purchases and discuss reimbursement arrangements in advance.

Date	Expense / purpose	Amount	Paid by

Monthly total / notes

Family communication log

Keep updates clear, respectful, and focused on decisions and next steps.

Date / person	Update / decision / next step

Care preferences and routines

Person-centered care begins with listening to what matters to your loved one.

Daily routines that bring comfort

Food, music, activities, and meaningful traditions

Communication preferences and things to avoid

Personal priorities, wishes, and what independence means to them

Caregiver self-care

Your needs belong in the care plan, too.

People I can ask for help

What I need this week (sleep, food, movement, connection, respite)

One boundary I can set or protect

One small thing that brings me joy

A reminder:

Rest and support are part of sustainable caregiving.

Weekly reflection and next steps

Take stock, celebrate what worked, and choose a manageable next step.

Week of

What went well this week?

What changed or needs attention?

Who can help next week?

My top three priorities for next week

Eating well, simply

Gentle food habits that support strength and daily wellbeing

Aim for regular meals with vegetables or fruit, whole grains, and protein-rich foods.

Protein foods may include eggs, yogurt, beans, fish, poultry, tofu or lentils.

Include fluids regularly, unless a clinician has recommended a fluid limit.

Consider easy-to-chew textures, appetite changes, allergies and personal preferences.

A clinician or dietitian can advise on individual protein, calorie or fluid needs.

Foods they enjoy / can comfortably eat

Protein-rich foods to keep on hand

Shopping or meal-prep help needed

Dietary instructions from care team

Ideas for easy, balanced meals

Seek professional guidance for unintended weight loss, trouble swallowing, poor appetite, kidney disease or other medically restricted diets.

Daily food and hydration tracker

A simple record of meals, protein-rich foods and fluids

Date / caregiver

Breakfast / protein food

Lunch / protein food

Dinner / protein food

Snacks / fruit and vegetables

Fluids (cups or other units, if appropriate)

Appetite, chewing/swallowing or meal assistance notes

Follow-up or changes to share with care team

Use this page as a gentle observation tool, not a calorie-counting requirement.

Follow any individual nutrition or fluid plan from the care team.

Movement and strength tracker

Comfortable activity to support mobility and muscle

When safe, regular walking and simple resistance movements can help maintain strength, balance and independence. Start with what feels manageable.

Examples: sit-to-stands from a sturdy chair, supported heel raises, wall push-ups, light resistance-band rows, and short walks with an appropriate mobility aid.

Ask the care team about safe movements and supervision if there are fall risks, recent surgery, heart symptoms, pain or significant mobility limitations.

Date / activity / minutes or repetitions

Strength exercise and level of assistance

Walking, balance or mobility activity

How it felt (energy, comfort, symptoms)

Next small goal / support needed

Stop activity and seek medical advice for concerning symptoms; emergency symptoms such as chest pain or severe breathlessness need urgent help.

Strength & Nutrition at a Glance

Week of: _____ Care recipient: _____

A gentle weekly overview. Record what happened, not whether the week was perfect.

Day	Meals noted	Protein food?	Fluids noted	Movement / reps
Monday				
Tuesday				
Wednesday				
Thursday				
Friday				
Saturday				
Sunday				

Weekly reflections

Foods and meals that went well

Movement that felt safe and comfortable

Barriers or changes to discuss with the care team

Tracking is informational only. Follow individualized nutrition, fluid and exercise advice.