

Caregiver Contact Sheet

Who to call, who can decide, and who does what. Update it when anything changes.

NAME / PERSON THIS SHEET IS FOR

DATE OF BIRTH

LAST CHECKED / UPDATED

1 Key people and what they are allowed to do

Check the authority each person has **in writing**. If none, check “None.” Being listed here does not give anyone authority.²

Name and relationship	Main phone	Backup phone	Health care agent	HIPAA-authorized	Financial agent	None
			☐	☐	☐	☐
			☐	☐	☐	☐
			☐	☐	☐	☐
			☐	☐	☐	☐
			☐	☐	☐	☐
			☐	☐	☐	☐
			☐	☐	☐	☐

Health care agent: named in a signed health care power of attorney to make medical decisions if I cannot. **HIPAA-authorized:** I signed a form letting providers share my health information with them. **Financial agent:** named in a signed durable financial power of attorney.^{2,3}

TRU-TIP • An emergency contact can't decide

Being your emergency contact means a person gets the phone call. It does not let them make medical decisions or get into your accounts. In an emergency summary, write each person's role next to their name so responders and hospitals know who holds what.⁴

2 Someone local who can come within an hour

Out-of-town family can make calls, but someone nearby has to be able to open the door, feed the pet, or meet the ambulance.⁴

Name	Phone	How far / how long to get here	Has a key?
Local person			☐
Backup local person			☐

3 Medical contacts

Contact	Name / clinic	Phone	After-hours phone / notes
Primary care			
Specialist			
Specialist			
Pharmacy			
Home health / other			

Helpers, backups, and how we stay in touch

4 Helper jobs: a primary and a backup for each

These are the jobs that become urgent in the first 24 to 48 hours if I am suddenly in the hospital.^{4,5}

Job	Primary helper: name / phone	Backup helper: name / phone	Notes (where things are, schedule)
Rides to appointments			
Medicines and pharmacy pickup			
Meals and groceries			
Pets: feeding, walks, vet			
Mail and packages			
Plants and a quick home check			
Spare key holder (no door codes here)			
Vehicle: where it is, moving it			
Appointments to cancel or move			
Bills that cannot wait			
Updating family and friends			

TRU-TIP • Set a family code word

Scammers now clone voices and call pretending to be a loved one in trouble. Agree on a code word with your helpers that is not on social media or easy to guess. If a caller cannot give it, hang up and call the person back on the number you already have. Do not write the code word on this sheet.⁴

TRU-TIP • Five names on paper is not five people who can come

Many people list helpers who all mean well. Then two live out of state, one is sick, one works days, and one has no car. For every job, ask: who can actually be here on a Tuesday morning, and who covers if they cannot?⁴

5 How we share updates

OUR ONE GROUP CHANNEL (GROUP TEXT, SHARED DOC, APP)

WHO UPDATES THE GROUP

WHO TALKS WITH THE CARE TEAM

WHERE MY BINDER / DOCUMENTS ARE KEPT

- ☐ Everyone on this sheet agreed to their job and knows who their backup is.¹
- ☐ Each person has a current copy of this sheet, or knows where it is kept.

Want to go further? The SynquUp™ Emergency Life Binder by Chuck Kinney has full contact, role, and authority pages that keep this in one place. Free tools: chuckkinney.com/free