

Caregiver Role Assignment

Four jobs, a named person and a backup for each, so nothing falls through the cracks and no one burns out.

PERSON WE ARE CARING FOR	START DATE	REVIEW DATE

1 Who does what

Try not to give one person more than one role. Every role needs a backup.¹

1. MEDICAL One person	2. LOGISTICS Can be shared
Goes to appointments, takes notes, talks with the care team, keeps the medicine list and binder current. Needs to be free during office hours. ¹	Rides, meals, groceries, pharmacy pickups, laundry, pets, and the house. Can be split among several people with set days. ¹
PRIMARY: NAME / PHONE 	PRIMARY: NAME / PHONE
BACKUP: NAME / PHONE 	BACKUP: NAME / PHONE
MAIN TASKS 	MAIN TASKS
HOW OFTEN / WHICH DAYS 	HOW OFTEN / WHICH DAYS
HANDS OFF TO BACKUP WHEN 	HANDS OFF TO BACKUP WHEN

3. MONEY & PAPERWORK One person	4. EMOTIONAL SUPPORT For the caregiver
Insurance, bills, billing questions, assistance programs, forms. An organized person who is comfortable on the phone. ¹	Checks in on the main caregiver, not just the patient. Asks how they are really doing and listens without trying to fix it. ¹
PRIMARY: NAME / PHONE 	PRIMARY: NAME / PHONE
BACKUP: NAME / PHONE 	BACKUP: NAME / PHONE
MAIN TASKS 	MAIN TASKS
HOW OFTEN / WHICH DAYS 	HOW OFTEN / WHICH DAYS
HANDS OFF TO BACKUP WHEN 	HANDS OFF TO BACKUP WHEN

TRU-TIP • Give every job a name and a backup

"We'll all pitch in" is how tasks get missed and resentment builds. Write a name on each job, and a second name for when that person is sick, traveling, or worn out. Roles can change later. They just need to exist now.¹

2 How we update each other

OUR ONE CHANNEL (GROUP TEXT, SHARED DOC, APP)	WEEKLY CHECK-IN: DAY / TIME
WHO UPDATES THE GROUP AFTER APPOINTMENTS	WHO THE CARE TEAM SHOULD CALL FIRST

- ☐ Each person agreed to their role and knows who their backup is.²
- ☐ The medical lead is listed with the care team. If they need to talk about my care when I am not there, I signed a HIPAA authorization naming them.⁸

Weekly plan, updates, and caring for the caregiver

3 Weekly task grid

Write the helper's initials under each day the task happens.

Task	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Notes
Rides to appointments								
Medicines and refills								
Meals / groceries								
Pets								
House / laundry								
Bills and mail								
Calls to the care team								
Visit or call the caregiver								

4 Watch for caregiver burnout

- ☐ Tired all the time, even after rest¹
☐ Feeling numb or detached¹
- ☐ Small decisions feel overwhelming¹
☐ Pulling away from friends and things that used to help¹
- ☐ Feeling like nothing you do makes a difference¹
☐ Skipping your own doctor visits, meals, or sleep³

If two or more are true, tell someone on this sheet today and let the backup step in for a while.

TRU-TIP • Burnout is not a personal failure

It is what happens when demands are bigger than the support for too long. Spotting it early is the fix. A worn-out caregiver makes more mistakes with medicines and is more likely to get sick, so rest is part of the care plan, not a break from it.¹

HELP FOR CAREGIVERS

NIA caregiving tips: nia.nih.gov/health/caregiving^{2,3} • **Local help, including your Area Agency on Aging and caregiver support programs:** Eldercare Locator, eldercare.acl.gov or 1-800-677-1116^{4,6} • **Respite (short breaks):** archrespite.org/caregiver-resources/respitelocator⁵ • **Crisis or thoughts of harming yourself:** call or text **988**, any time.⁷ In an emergency, call 911.

Want to go further? *Infusing Hope* by Chuck Kinney includes a full Caregiver Operating System, and the SynquUp™ Emergency Life Binder keeps roles, contacts, and medical pages together. Free tools: chuckkinney.com/free