



PEACE OF MIND CHECKLIST

Everything Your Family Needs to Know

STEPS:

1. Complete this checklist for yourself or a loved one
2. Visit CareTabs.com & create your FREE account
3. Upload this checklist to your Important Documents

Owner's Name:

Last Updated:

SAFE. SECURE. PROTECTED.

This checklist + a CareTabs account = Complete protection

[Create your FREE account at CareTabs.com](https://www.caretabs.com)

1) EMERGENCY & CONTACTS

• Primary Emergency Contact

Name:

Phone:

Email:

Relationship:

• Secondary Emergency Contact

Name:

Phone:

Email:

Relationship:

• Primary Care Provider (PCP)

Name:

Phone:

Address:

• Preferred Hospital/ER

Name:

Phone:

Address:

• Care Coordinator/Caregiver (if any)

Name:

Phone:

Agency:

PHARMACY & SPECIALISTS**• Pharmacy**

Name:

Phone:

Address:

• Specialist #1

Name:

Type:

Phone:

Notes:

• Specialist #2

Name:

Type:

Phone:

Notes:

• Hospice / Home Health (if applicable)

Provider:

Phone:

Notes:

• Insurance Member Services

Company:

Phone (Medical):

Phone (Rx):

Notes:

2) MEDICAL SNAPSHOT

DOB:

Height:

Weight:

Blood Type (if known):

Allergies (drug/food/other):

Current Diagnoses/Conditions:

Primary medications list - see Section 3

Vaccinations (flu, COVID-19, shingles, pneumonia, tetanus):

Medical Devices (pacemaker, CPAP, hearing aids, implants):

Mobility / Fall Risk Considerations:

Communication Needs (hearing/vision/cognitive/language):

3) MEDICATIONS

List all current medications, dosages, frequency, and prescribing doctor

- **Medication #1**

Name:

Dosage:

Frequency:

Prescribing Dr:

- **Medication #2**

Name:

Dosage:

Frequency:

Prescribing Dr:

- **Medication #3**

Name:

Dosage:

Frequency:

Prescribing Dr:

- **Medication #4**

Name:

Dosage:

Frequency:

Prescribing Dr:

- **Medication #5**

Name:

Dosage:

Frequency:

Prescribing Dr:

Pharmacy auto-refill enabled

Pill organizer used

4) HEALTHCARE WISHES & LEGAL

Check all that apply and note where copies are stored

Advance Health Care Directive / Living Will — copy attached

Medical Power of Attorney (Healthcare Proxy) — copy attached

Do Not Resuscitate (DNR) / POLST — copy attached

HIPAA Release(s) — copy attached

- **Primary Healthcare Decision-Maker**

Name:

Phone:

- **Alternate Healthcare Decision-Maker**

Name:

Phone:

Care Preferences (pain management, home vs. facility, faith/cultural needs):

End-of-Life Preferences (spiritual contacts, rituals, memorial wishes):

Storage Location of Original Documents:

5) IDENTITY, FINANCE & INSURANCE

Check items that have copies attached and record key numbers

Government ID (driver's license/state ID) — copy attached

Social Security card/number — copy attached (secure location)

Medicare card (Parts A/B/D) — copy attached

Medicare #:

Supplemental/Medigap/MA plan card — copy attached

Policy #:

Private health insurance — copy attached

Policy #:

Long-term care insurance — copy attached

Policy #:

Life insurance — copy attached

Policy #:

Home/renters/auto insurance — copies attached

Policy #s:

FINANCIAL ACCOUNTS

List institution + last 4 digits only for security

Banking Accounts (institution + last 4):

Investment/Retirement Accounts (institution + last 4):

Bill Pay List (utilities, phone, internet, subscriptions):

• Trusted Financial Contact #1

Name:

Phone:

Relationship:

• Trusted Financial Contact #2

Name:

Phone:

Relationship:

Additional Financial Notes:

6) LEGAL & ESTATE

Will — copy attached

Attorney:

Phone:

Durable Power of Attorney (Finances) — copy attached

Trust documents — copy attached

Trustee(s):

Deeds / titles (home, vehicles) — copies attached

Safe deposit box

Bank/Branch:

Box #:

Key Location:

Tax returns (last 2-3 years) — copies attached

Tax Preparer:

Legal/Estate Notes:

7) HOME, UTILITIES & ACCESS

Home Address:

Keyholders (names + phone):

Keypad/Garage Code:

Alarm Code:

Alarm Company:

• Utilities

Power Co:

Acct:

Phone:

Gas Co:

Acct:

Phone:

Water Co:

Acct:

Phone:

Internet:

Acct:

Phone:

Mobile/Phone:

Acct:

Phone:

Critical Home Info (shutoff valves, pets/vet, maintenance):

8) DIGITAL & ACCESS MANAGEMENT

Primary Email:

Recovery Email/Phone:

Phone Passcode:

Biometric Set?

- **Password Manager**

Service (1Password, Bitwarden, etc.):

Emergency access enabled

- **Important Logins**

Patient portal, insurance, bank, pharmacy, CareTabs, etc.

Service:

Username:

Service:

Username:

Service:

Username:

Digital Copies (encrypted) Stored At:

Sharing Plan (who has access & how):

9) DAILY CARE & ROUTINES (if applicable)

Morning Routine / Assistance Needed:

Evening Routine / Assistance Needed:

Dietary Needs / Preferences:

Mobility Aids / Transfer Notes:

Transportation Plan (appointments, errands):

Community/Support Services (meals, adult day care, faith orgs):

Additional Care Notes:

10) DOCUMENTS TO COPY & INCLUDE

Check each document you have attached to this checklist

Photo ID(s)

Medicare & insurance cards

Advance Directive / POLST / DNR

Medical & Financial POAs

Will / Trust summary page

Medication list

Key insurance policy summary pages

Recent statements (bank/investment)

Deed/title copies

Contact list

11) STORAGE & SAFETY

Physical Originals Stored At:

Copies Stored At:

Digital Backups Stored At:

Fireproof/waterproof storage used

Emergency grab-and-go folder set up

12) WHO HAS ACCESS (and to what)

Name:	Relationship:
Phone/Email:	Access Granted:
Name:	Relationship:
Phone/Email:	Access Granted:
Name:	Relationship:
Phone/Email:	Access Granted:

13) UPDATE LOG

Track when this checklist is reviewed and updated

Date:	What Changed:	Updated By:
Date:	What Changed:	Updated By:
Date:	What Changed:	Updated By:
Date:	What Changed:	Updated By:

QUICK-GRAB SHEET (Place at Front)

Fill this out for fast emergency reference

Name:

DOB:

Allergies:

Primary Contact:

Phone:

PCP:

Phone:

Preferred ER:

• **Top 3 Medications**

1:

2:

3:

Advance Directive on file

POA (Health) on file

DNR/POLST on file

Care Preferences:

Key Document Location (folder/safe):

Keep Everything Organized with CareTabs

You've done the hard work. Now make sure it's always accessible
when your family needs it most.

[Start Your FREE Account at CareTabs.com](https://www.caretabs.com)