



BRIGHTWAY AGING ADVOCACY

Caregiver Organization Guide

A practical framework for keeping information, contacts, and priorities in one steady place.

Use this guide to gather medications, contacts, routines, appointments, forms, and the next steps your family does not want to lose track of.

Fillable digital PDF with senior-friendly spacing

Brightway Aging Advocacy

Guidance | Clarity | Compassion

Start Here: Build a Calm, Usable System

This digital version lets you type directly into the guide and check off items as they are completed. Start with the basics. Add more as needed.

Helpful phrase

“Let me write that down.”

When the information feels overwhelming, pause, repeat it back, and put it in one steady place.

Write this down first

Care recipient _____

Primary caregiver _____

Best callback number _____

Main diagnosis or concerns _____

Preferred pharmacy _____

Primary doctor / clinic _____

What would make this guide most helpful this week?

Write your priorities here

1. Important Contacts and Communication

When several people are helping, communication easily gets scattered. Use larger spaces to keep names, roles, and numbers easy to find.

Medical contacts			
Name / role	Phone	Office / clinic	Notes

Best times to call / who returns calls fastest

2. Family, Friends, and the Support Team

This page is for the people around the care recipient - the helpers who shop, call, drive, visit, pick up prescriptions, or step in during emergencies.

Support team			
Name	How they help	Best contact	Notes / availability

Who should receive updates?

3. Medications, Allergies, and Health Information

A current medication list helps prevent confusion and gives caregivers something reliable to reference during appointments, discharges, and emergencies.

Medication list			
Medication	Dose	When / why	Prescriber / notes

Allergies / bad reactions

4. Appointments, Questions, and the Care Plan

Care feels steadier when the next steps are written down clearly. This page gives more room for dates, locations, and the questions you do not want to forget.

Upcoming appointments				
Date	Provider	Location / phone	Purpose	Transportation / prep

Questions to ask next

- What is the main goal right now?
- What should improve - and by when?
- What changes should we watch for?
- Who do we call after hours or on weekends?

My extra questions

5. Documents, Insurance, and Access

Paperwork can quickly become the most frustrating part of caregiving. Keep the key items and access details in one visible, easy-to-update place.

Important documents	Where / how to access them
<ul style="list-style-type: none"><input type="checkbox"/> Insurance cards<input type="checkbox"/> Medication list<input type="checkbox"/> Recent visit summaries<input type="checkbox"/> Advance directive / POLST<input type="checkbox"/> Power of attorney / authorized contacts<input type="checkbox"/> Identification and emergency information	<div style="border: 1px solid #ccc; padding: 10px; min-height: 150px;"><hr/><hr/><hr/><hr/><hr/><hr/><hr/><hr/></div>

Insurance and billing notes	
Primary insurance	<hr/>
Member ID	<hr/>
Pharmacy plan	<hr/>
Portal / website	<hr/>
Billing contact	<hr/>
Authorizations / claim notes	<hr/>

6. Daily Routine, Supplies, and Home Safety

Use this page to make everyday care easier - especially when more than one person is helping or when routines change after a hospital stay or health setback.

Daily routine snapshot

Time	What needs to happen

Supplies and equipment to monitor

- Prescriptions and refills
- Blood pressure or glucose supplies
- Incontinence supplies
- Wound care items
- Nutrition / hydration supports
- Walker, cane, wheelchair, or oxygen needs

Home safety reminders / concerns

7. Weekly Priorities and Notes

Not everything can be done at once. This page gives more room to decide what matters today, what needs attention this week, and what can wait.

Weekly priorities	Notes, updates, and wins
Today _____ _____	<div style="border: 1px solid #ccc; padding: 10px;"><hr/><hr/><hr/><hr/><hr/><hr/><hr/><hr/><hr/><hr/></div>
This week _____ _____	
Appointments to confirm _____ _____	
Calls / refills / forms _____ _____	
One thing that would help most _____ _____	

Anything I do not want to forget

A Gentle Reminder

A good system does not need to be perfect. It just needs to be steady, readable, and available when people are tired, worried, or trying to make a quick decision.

The goal is not perfection. The goal is a calm, reliable place to keep what matters.

Open notes / reminders / questions

- If this guide starts to feel too full, use a second copy and keep older pages for reference.
- Bring the medication and appointment pages to visits when you can.
- Do not hesitate to ask for written instructions in larger print.