The caregiver notebook can be documented in a simple three-ring binder and be used as a guide for your own needs and for anyone else who might step in to assist or take over. It is a diary and a guide book. The following is what you’ll need, including a list of the information you may include in each section. It needn’t be complete at the beginning. It can grow and adapt with your needs.

**Caregiver Notebook:**
- Three-ring notebook
- Notebook paper
- Tabbed dividers with pockets

1. **Emergency Contact Information**
   - Family members, friends, neighbors
   - Out-of-state contacts in case of natural disasters
   - Medic Alert + Safe Return bracelet (include ID Number)

2. **Emergency Plan of Action**
   - Person to call if you are incapacitated
   - Person or facility to provide care in your absence

3. **Health Information**
   - Physical conditions
   - Mental health conditions
   - Emotional conditions
   - Family history
   - Prescriptions (see Medication Record):
     - Name
     - Prescribed dosage
     - Instructions
     - Doctor’s name
     - Pharmacy information
   - Insurance policies – what is covered?
   - Adaptive devices
   - Fact sheets
   - Daily observation notes
   - Questions to ask doctors
   - Lists of service providers/community resources

   - Names, addresses and telephone numbers:
     - Doctors
     - Pharmacy
     - Hospital
     - Ophthalmologist
     - Audiologist
     - Medical supplies

   - Vital numbers:
     - Social Security number
     - Medicare/Medi-Cal numbers
     - Insurance plan number
     - Claim assistance telephone numbers

   - Physician visit notes – time, date, name, title, what they said

- Sample meal plans
- Calendar-keep track of appointments, prescription refills

---

Alzheimer's Orange County

844.373.4400 | [www.alzoc.org](http://www.alzoc.org)
4. Housing
- Basic home layout
- Emergency exit plan
- Wish list of remodeling projects
- Medical supply catalogues—daily living aids
- Government, community services
- Disaster preparedness kit

5. Providers
- Advertising brochures
- List of questions
- Conversation notes
- Resource lists

6. Legal Records
- Documents: (note where documents are located)
  - Birth certificate
  - Marriage certificate
  - Divorce decree
  - Social Security card
  - Military records
  - Naturalization records
  - Tax records
  - Health care power of attorney
  - Financial power of attorney
  - Living trust
  - Will
  - Health insurance policies
  - Medicare card and records
  - Medi-Cal card and records
  - Disability insurance policy
  - Life insurance policy
  - Funeral insurance
  - Funeral instructions
  - Cemetery plot deed
  - Real estate deeds
  - Mortgages
  - Apartment lease
  - Homeowner’s insurance policies
  - Automobile pink slip
  - Automobile insurance policy
  - Appraisal/valuation of collections
7. Financial Records

- Sources of monthly income
- Monthly/annual expenses
- Safe deposit box
- Name address and telephone numbers:
  - Accountant
  - Attorney
  - Bankers

8. To Do Lists

- People to call
- Things to remember
- Responsibilities
- Documents to acquire
- Care reminders