

Senior Care Plan

A downloadable resource to help you document your loved one’s needs, wishes, and care preferences — brought to you by StoryPoint Group.

Basic Information

Start here by gathering your loved one’s basic details and key emergency contacts. This information ensures care providers and family members can quickly access important identifiers in any situation.

Contact Information

Name	Date of Birth	Phone Number	
Address	City	State	ZIP

Emergency Information

Emergency Contact Name #1	Emergency Phone Number	Relationship
Emergency Contact Name #2	Emergency Phone Number	Relationship
Emergency Contact Name #3	Emergency Phone Number	Relationship

Health Assessment & Medical Information

A complete picture of your loved one’s health helps guide day-to-day care and decision-making. Use this section to list doctors, diagnoses, medications, allergies, and other important medical details.

Primary Care Physician Name

Primary Care Physician Phone Number

Specialist (Name, Type)

Specialist Phone Number

Allergies

Medical Conditions/Diagnoses

Date of Last Annual Check-up

Medical Equipment Used (Wheelchair, Walker, etc)

Additional Notes:

Medication Schedule & Dosage

Use this section to take note of any medications taken, along with their dosages and frequencies.

Medication Schedule

Medication	Dose	Time	S	M	T	W	TH	F	S

Additional Notes:

Activities of Daily Living (ADLs)

Daily tasks can become more challenging with age, and identifying where support is needed is an important part of creating a thoughtful care plan. Use this section to document the areas where your loved one may need help – from mobility and personal care to meal preparation and more.

How to use this checklist:

1. Check the items that apply to your loved one.

2. Add notes or dates to track when issues occur or change.
3. Review regularly as needs change.

4. Share with doctors or care providers to guide care decisions.

Checklist

Comments and Notes
Bathing
Meal Preparation
Transportation
Dressing
Housekeeping
Managing Appointments
Eating
Laundry
Shopping
Toileting
Medication Management

Activities of Daily Living (ADLs) continued

Comments and Notes	
Managing Finances	
Mobility (walking, using stairs)	
Grooming/ Hygiene	
Using Technology	

Safety & Emergency Preparedness

This section helps you plan ahead for unexpected situations. From emergency contacts to home modifications, document steps to keep your loved one safe and supported.

Current Home Safety Features	Medical Alert Device
Emergency Protocol (who to call, what to do)	
Fire Safety Plan/Natural Disaster Plan	

Financial & Legal Considerations

Managing finances and legal documents is an important part of long-term care planning. Use this section to track income, expenses, insurance, and essential legal directives.

Monthly Income Sources	Key Expenses (Estimates)
Insurance Provider	Long-Term Care Insurance

Legal Documentation

Legal Documents on File (Check all that apply)

- Power of Attorney (POA)
- Health Care POA
- Living Will

Attorney / Financial Advisor Contact Information

Attorney Name	Attorney Phone Number
Financial Advisor Name	Financial Advisor Phone Number

Additional Notes:

Emotional & Social Well-Being

It's the little things that make a big difference. Capture your loved one's favorite meals, daily routines, personal care needs, and special touches that bring them joy.

Favorite Hobbies or Activities

Social Preferences (visits, calls, outings, etc.)

Support Systems (friends, church, etc.)

Signs of Emotional Concern

Additional Notes:

[illegible]

Lifestyle & Personal Preferences

It's the little things that make a big difference. Capture your loved one's favorite meals, daily routines, personal care needs, and special touches that bring them joy.

Favorite Foods or Dietary Needs

Typical Daily Routine

Entertainment Preferences (books, shows, movies, etc)

Favorite Personal Care Products (specific brands, types, etc.)

Additional Notes:

This image shows a single sheet of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page. There are approximately 20 lines visible. The paper has a slight shadow on the right side, suggesting it's resting on a surface.

Care Team & Responsibilities

Caring for someone is a team effort. Use this section to list everyone involved, their roles, and how they contribute to your loved one’s care.

Name	Role	Phone Number

Responsibilities

Name	Role	Phone Number

Responsibilities

Name	Role	Phone Number

Responsibilities