

ONE PARENT READY

Caregiver Handoff Checklist

One parent. One clear plan.
Ready for whatever comes.

Use this checklist to gather the practical information a trusted caregiver would need to care for your children. Keep sensitive records in a secure place, tell caregivers how to access them, and review your plan at least twice each year.

PLAN OWNER

Name	
Last reviewed	
Primary caregiver	

Important

This resource is for organization and caregiver communication. It is not a will, legal guardianship appointment, medical directive, or substitute for advice from a qualified attorney, financial professional, or healthcare provider.

1. People and immediate contacts

Begin with the people a caregiver may need to reach quickly.

[] Primary trusted caregiver's full name, phone, email, and address	Ready / Update
[] Backup caregiver's full name, phone, email, and address	Ready / Update
[] Emergency contacts who know your children well	Ready / Update
[] Each child's full legal name, preferred name, and birth date	Ready / Update
[] School, teacher, grade, attendance number, and pickup procedures	Ready / Update
[] Approved pickup contacts and people who must not pick up	Ready / Update
[] Close relatives, neighbors, faith community, and family friends	Ready / Update
[] Your attorney, executor, or other professional contact, if applicable	Ready / Update

Notes and secure-storage location

2. Daily life and routines

Write down the ordinary details that help children feel safe and settled.

☐ Typical wake-up, school, homework, dinner, and bedtime schedule	Ready / Update
☐ Morning and bedtime routines for each child	Ready / Update
☐ Meals, snacks, food preferences, and food restrictions	Ready / Update
☐ Childcare, after-school programs, sports, lessons, and transportation	Ready / Update
☐ Screen-time rules, device access, and household expectations	Ready / Update
☐ Comfort objects, calming strategies, fears, and sensory needs	Ready / Update
☐ Important family traditions, faith practices, and community connections	Ready / Update
☐ Pet feeding, medications, veterinarian, and backup pet care	Ready / Update

Notes and secure-storage location

3. Health and wellness

Give caregivers enough information to act safely, while storing records securely.

☐ Pediatrician, dentist, specialists, pharmacy, and urgent care preference	Ready / Update
☐ Insurance carrier, member numbers, and location of insurance cards	Ready / Update
☐ Allergies, chronic conditions, disabilities, and accommodations	Ready / Update
☐ Current medications, doses, schedules, prescribing doctors, and refills	Ready / Update
☐ Emergency medication instructions, including inhalers or epinephrine	Ready / Update
☐ Therapists, counselors, school supports, and treatment considerations	Ready / Update
☐ Immunization and medical record location	Ready / Update
☐ Written medical-consent documents and where originals are stored	Ready / Update

Notes and secure-storage location

4. Home, transportation, and practical details

Record what someone would need to keep daily life functioning.

[] Home address, safe entry instructions, alarm contacts, and spare-key location	Ready / Update
[] Landlord, mortgage, utilities, maintenance, and trusted repair contacts	Ready / Update
[] Vehicle details, insurance, registration, keys, and child-seat needs	Ready / Update
[] Public transportation, school bus, and regular travel arrangements	Ready / Update
[] Household calendar, recurring bills, subscriptions, and essential deliveries	Ready / Update
[] Location of birth certificates, Social Security cards, passports, and records	Ready / Update
[] Devices needed for school, access instructions, and account-recovery plan	Ready / Update
[] Emergency cash, supplies, meeting locations, and evacuation arrangements	Ready / Update

Notes and secure-storage location

5. Legal, financial, and long-term planning

This checklist organizes information, but it is not a substitute for legal advice.

☐ Current will and guardian nomination prepared under your state's law	Ready / Update
☐ Temporary caregiver authorization and medical consent, where appropriate	Ready / Update
☐ Life-insurance carrier, policy contact, and beneficiary review date	Ready / Update
☐ Employer benefits, retirement accounts, and survivor-benefit contacts	Ready / Update
☐ Banking and bill-payment continuity instructions without exposing passwords	Ready / Update
☐ Trust, estate, custody, adoption, or court-document location	Ready / Update
☐ Written explanation of your hopes for schooling, faith, family ties, and care	Ready / Update
☐ Date the plan was reviewed with primary and backup caregivers	Ready / Update

Notes and secure-storage location

Your six-month review

Set two recurring dates each year. Confirm contacts, medications, school details, insurance, legal documents, and caregiver availability. Destroy outdated printed copies when replacing them.