



Caregiver Handoff Workbook

A printable guide for transferring practical responsibility to a trusted helper without sending the entire private archive.

What this workbook helps you do

- [] Define exactly what responsibility is being transferred and for how long.
- [] Give the helper the contacts, timing, routines, and task context they need.
- [] Select records and documents according to the helper's role.
- [] Record ownership, acknowledgement, and the return path for open work.
- [] Keep unrelated private information outside the handoff.

A simple way to use it

- [] Work from the information and source material available to you.
- [] Leave uncertain or conflicting details visible for review.
- [] Use the worksheets before, during, and after the care moment as appropriate.
- [] Transfer selected information into CareTrove only when you choose.

Important boundary

This workbook supports organization and human review. It does not provide medical advice, diagnosis, treatment, medication guidance, emergency monitoring, or professional care instructions. Check important details against source documents and qualified professionals. Store completed pages securely and share only selected information.

Comprehensive checklist

Check the items that apply to the current situation. Skip anything that is not relevant, and keep questions open when a source or qualified professional still needs to confirm them.

1. Handoff scope

- ☐ Name the responsibility being transferred in specific terms.
- ☐ Record the start, end, and any recurring schedule for the handoff.
- ☐ Clarify what remains with the primary caregiver or owner.
- ☐ Identify decisions the helper may make and decisions they should return for confirmation.
- ☐ Write down how the helper should report completion or a problem.

2. Practical context

- ☐ Share the contacts relevant to the helper's role.
- ☐ Record appointment times, transportation, pickups, calls, and document locations.
- ☐ Include routines, preferences, access notes, and communication expectations when relevant.
- ☐ Keep source-provided urgent or emergency instructions visible when the helper needs them.
- ☐ Confirm the best way to reach the primary caregiver during the handoff window.

3. Selected information

- ☐ Choose the minimum records, documents, and summaries needed for the task.
- ☐ Review every shared item for unrelated private details.
- ☐ Avoid treating a focused handoff as permission to share the full archive.
- ☐ Use an appropriate recipient and sharing method for sensitive information.
- ☐ Record what was shared, with whom, and for what purpose.

4. Ownership and closeout

- ☐ Assign each task to one person and record the expected completion point.
- ☐ Ask the helper to acknowledge the responsibilities they accepted.
- ☐ Keep incomplete, changed, or uncertain items visible.
- ☐ Return documents, keys, access details, or temporary responsibilities as appropriate.
- ☐ Close the handoff with a short update rather than relying on memory.

Working worksheet

Use these fields as a private working page. Store completed pages securely and avoid sending them through CareTrove website forms.

Helper, relationship, and contact information

Handoff window and specific responsibility

What remains with the primary caregiver

Appointments, calls, pickups, or timed tasks

Routines, preferences, access, or communication notes

Selected records or documents being shared

How and when the helper should report back

Transferred responsibility tracker

Use this table to make ownership and acknowledgement explicit during the handoff window.

Responsibility	Owner	When	Acknowledged

Review before closing this work

- ☐ The helper understands the handoff window and limits of the role.
- ☐ Every task has one clear owner.
- ☐ Only selected information needed for the handoff is included.
- ☐ There is a clear return path for questions, changes, and incomplete work.

CareTrove connection

CareTrove can help organize selected records, documents, questions, tasks, and packet outputs around a care profile. Review information before use, and choose deliberately what leaves the private workspace.

Source and review log

Use this page to keep important details connected to their source and review status. A saved detail can remain unresolved until the right confirmation is available.

Source or document	Date	Detail to verify	Reviewed

Review prompts

- [] What did the helper accept responsibility for?
- [] What information or documents were shared?
- [] What changed during the handoff window?
- [] What remains open when responsibility returns?

Additional notes

Notes, questions, changes, or items to revisit

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