

Safe Haven Connect CIC · Registered CIC

Caregiver Planner

A Practical Planner for Family Members, Friends & Unpaid Carers

Version 1.0

Welcome

Caring for someone you love can be one of the most rewarding things you ever do, but it can also be physically, emotionally and mentally demanding.

Whether you're caring for a parent, partner, child, relative, friend or neighbour, this planner has been designed to help you stay organised while also reminding you to look after yourself.

You don't have to remember everything on your own. Keeping important information in one place can make day-to-day caring easier and can also be invaluable during appointments, hospital visits or emergencies.

Remember—you matter too.

What's Inside

Personal Information

Emergency Contacts

Medical Information

Medication Record

Appointment Planner

Daily Care Notes

Symptoms & Health Tracker

Mood & Behaviour Log

Hospital Stay Planner

Equipment & Supplies

Important Documents Checklist

Finance & Benefits Notes

Questions for Professionals

Self-Care for Carers

Weekly Planner

Monthly Planner

Notes Pages

About the Person I Care For

Name:

Date of Birth:

Address:

NHS Number (if known):

Emergency Contact:

Relationship to Me:

Emergency Contacts

Name	Relationship	Telephone
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GP Surgery

Practice Name:

Address:

Telephone:

Named GP:

Main Hospital / Consultant

Hospital:

Consultant:

Department:

Telephone:

Email:

Important Information

Medical Conditions:

Allergies:

Communication Needs:

Mobility Needs:

Dietary Requirements:

Next section: Medical Information & Medication Record.

Medical Information & Medication Record

Keeping accurate medical information together can save time during appointments and emergencies.

Medical Conditions

Condition	Diagnosed	Notes
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Allergies

Allergy Reaction	Notes
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Healthcare Professionals

Name	Role	Telephone	Email
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GP

Consultant

Community Nurse

Occupational Therapist

Physiotherapist

Mental Health Team

Social Worker

Other

Current Medication Record

Medication	Dose	Time Taken	Reason	Notes
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Medication Schedule

☐ Morning

☐ Lunchtime

☐ Afternoon

☐ Evening

☐ Bedtime

Pharmacy Details

Pharmacy Name

Address

Telephone

Opening Hours

Medical Equipment

Please list any equipment used.

☐ Walking Stick

☐ Walking Frame

☐ Wheelchair

☐ Hoist

☐ Hospital Bed

☐ Oxygen

☐ Hearing Aids

☐ Glasses

☐ Pressure Cushion

☐ Other

Important Care Information

Use this page for anything professionals or emergency services should know.

Health Monitoring

Record anything that changes between appointments.

Date	What Changed?	Action Taken
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Next Section: Medical Appointments & Healthcare Visits.

Medical Appointments & Healthcare Visits

Keeping track of appointments can help ensure important information isn't forgotten and provides a useful record of ongoing care.

Upcoming Appointments

Date	Time	Healthcare Professional	Location	Purpose
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Appointment Preparation

Before each appointment, write down anything you want to discuss.

Questions

Symptoms or Changes

Concerns

Appointment Notes

Date

Professional Seen

Key Information

Tests Requested

Medication Changes

Follow-Up Required

Next Appointment

Healthcare Visits Log

Date	Professional	Reason for Visit	Outcome
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Hospital Admissions

Admission Date	Hospital	Reason	Discharge Date
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Hospital Notes

Test Results Tracker

Date	Test	Result	Follow-Up
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Vaccinations Record

Vaccine	Date	Next Due
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Next Section: Daily Care Routine & Care Notes.

Daily Care Routine & Care Notes

Having a daily routine can help ensure important tasks are completed and make it easier for others to step in if needed.

Daily Care Checklist

Date: _____

- ☐ Morning medication given
- ☐ Personal care completed
- ☐ Shower/Bath
- ☐ Teeth cleaned
- ☐ Hair brushed
- ☐ Dressed
- ☐ Breakfast eaten
- ☐ Fluids encouraged
- ☐ Lunch eaten
- ☐ Evening meal eaten
- ☐ Snacks provided
- ☐ Medication taken as prescribed
- ☐ Exercise or mobility completed
- ☐ Fresh air or activity
- ☐ Toileting supported

☐ Evening routine completed

☐ Ready for bed

Personal Care Record

Task	Morning	Afternoon	Evening
Washing	☐	☐	☐
Dressing	☐	☐	☐
Toileting	☐	☐	☐
Eating ☐	☐	☐	
Drinking	☐	☐	☐
Medication	☐	☐	☐
Mobility	☐	☐	☐

Food & Fluid Intake

Meals

Breakfast:

Lunch:

Dinner:

Snacks:

Approximate Fluids

- ☐ Less than 500ml
- ☐ 500ml–1 litre
- ☐ 1–1.5 litres
- ☐ More than 1.5 litres

Notes:

Daily Notes

How has today gone?

Mood & Wellbeing

How would you describe today's mood?

- ☐ Happy
- ☐ Calm

- ☐ Anxious
- ☐ Low Mood
- ☐ Confused
- ☐ Agitated
- ☐ Tired
- ☐ Other:

Comments:

Sleep Record

Last night's sleep:

- ☐ Very Good
- ☐ Good
- ☐ Fair
- ☐ Poor

Hours slept:

Any concerns?

Things That Went Well Today

Things to Remember Tomorrow

Next Section: Symptoms, Behaviour & Health Monitoring.

Symptoms, Behaviour & Health Monitoring

Monitoring changes over time can help identify patterns, provide useful information during healthcare appointments and ensure concerns are acted upon promptly.

Daily Symptoms Tracker

Date: _____

Please tick any symptoms experienced today.

☐ Pain

☐ Shortness of breath

☐ Dizziness

☐ Headache

☐ Nausea

☐ Vomiting

☐ Diarrhoea

☐ Constipation

☐ Swelling

☐ Fever

☐ Cough

☐ Fatigue

☐ Poor Appetite

☐ Difficulty Sleeping

☐ Increased Confusion

☐ Anxiety

☐ Low Mood

☐ Other:

Notes:

Pain Record

Pain Level (0–10)

0 😊 No Pain

10 😞 Worst Pain Possible

Today's Pain Score:

_____/10

Location of Pain:

What helped?

☐ Medication

☐ Rest

☐ Heat Pack

☐ Cold Pack

☐ Gentle Exercise

☐ Other

Comments:

Behaviour & Mood Changes

Tick anything noticed today.

☐ Calm

- ☐ Happy
- ☐ More Talkative
- ☐ Withdrawn
- ☐ Tearful
- ☐ Anxious
- ☐ Agitated
- ☐ Confused
- ☐ Restless
- ☐ Angry
- ☐ Sleeping More
- ☐ Sleeping Less
- ☐ Loss of Interest
- ☐ Other

Additional Notes:

Falls & Accidents Record

Date	What Happened?	Injury?	Action Taken
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Weight Record

Date	Weight
------	--------

Blood Pressure / Pulse / Blood Glucose (Optional)

Date	Blood Pressure	Pulse	Blood Glucose
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Health Concerns to Discuss

Use this page to note anything you would like to raise with a GP, nurse or other healthcare professional.

Emergency Warning Signs

If any of the following occur, seek urgent medical advice immediately:

- ☐ Chest pain
- ☐ Difficulty breathing
- ☐ Sudden confusion
- ☐ Loss of consciousness
- ☐ Signs of stroke (Face, Arm, Speech, Time)
- ☐ Severe allergic reaction
- ☐ Uncontrolled bleeding
- ☐ High fever with severe illness
- ☐ Any sudden or serious change that causes concern

Next Section: Equipment, Supplies & Important Documents.

Equipment, Supplies & Important Documents

Keeping track of equipment, supplies and important documents in one place can make caring easier and help you stay organised.

Medical Equipment Checklist

Tick any equipment currently being used.

- ☐ Walking Stick

- ☐ Walking Frame
- ☐ Wheelchair
- ☐ Mobility Scooter
- ☐ Hoist
- ☐ Hospital Bed
- ☐ Pressure Mattress
- ☐ Pressure Cushion
- ☐ Commode
- ☐ Raised Toilet Seat
- ☐ Shower Chair
- ☐ Grab Rails
- ☐ Oxygen Equipment
- ☐ Nebuliser
- ☐ Blood Pressure Monitor
- ☐ Blood Glucose Monitor
- ☐ Hearing Aids
- ☐ Glasses
- ☐ Dentures
- ☐ Other

Equipment Maintenance Log

Equipment	Last Checked	Next Service Due	Notes
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Prescription & Medical Supplies

Use this page to keep track of items that need ordering.

Item	Current Stock	Reorder Date	Ordered
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			☐
			☐
			☐
			☐
			☐

Regular Deliveries

Supplier	What Is Delivered?	Contact Number
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Important Documents Checklist

Tick once completed and record where documents are stored.

- ☐ NHS Number
- ☐ Birth Certificate
- ☐ Passport
- ☐ Driving Licence

- ☐ Care Plan
- ☐ Hospital Letters
- ☐ Medication List
- ☐ Lasting Power of Attorney (Health & Welfare)
- ☐ Lasting Power of Attorney (Property & Finance)
- ☐ Advance Decision / Living Will
- ☐ Benefits Information
- ☐ Blue Badge
- ☐ Attendance Allowance / PIP Information
- ☐ Insurance Documents
- ☐ Other

Document Storage

Where are important documents kept?

Useful Contacts

Organisation	Telephone	Notes
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GP Surgery
Pharmacy
Community Nurse
Social Worker
Equipment Provider
Emergency Contact
Other

Important Information

Use this page for anything you may need to access quickly.

Next Section: Finance, Benefits & Carer Information.

Finance, Benefits & Carer Information

Caring often involves managing finances, benefits and important paperwork. Keeping everything together can reduce stress and make it easier to plan ahead.

Monthly Care Expenses

Item	Monthly Cost	Paid By
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Benefits Checklist

Tick any benefits currently received.

- ☐ Attendance Allowance
- ☐ Personal Independence Payment (PIP)
- ☐ Disability Living Allowance (DLA)
- ☐ Universal Credit
- ☐ Pension Credit
- ☐ Carer's Allowance
- ☐ Housing Benefit
- ☐ Council Tax Reduction
- ☐ NHS Low Income Scheme
- ☐ Blue Badge
- ☐ Other

Important Renewal Dates

Benefit / Service	Renewal Date Notes
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Direct Debits & Regular Payments

Payment	Amount	Payment Date
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Care Services

Service	Contact	Telephone	Days/Times
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Home Care			
Community Nurse			
Day Centre			
Respite Care			
Other			

Carer's Information

Main Carer:

Relationship:

Telephone:

Email:

Alternative Carer:

Emergency Contact:

Carer's Wellbeing Check

As a carer, your wellbeing matters too.

Over the past week have you:

- ☐ Had enough sleep?
- ☐ Eaten regular meals?
- ☐ Taken time to relax?
- ☐ Spoken to someone about how you're feeling?
- ☐ Taken a break from caring?
- ☐ Attended your own appointments?
- ☐ Asked for help when needed?

Notes & Reminders

Useful Websites

Use this space to record helpful websites and online services.

Future Planning

Things I need to organise or look into:

- ☐ Benefits review
- ☐ Care assessment
- ☐ Carer's assessment
- ☐ Equipment review
- ☐ Home adaptations
- ☐ Respite care

☐ Legal documents

☐ Other

Next Section: Weekly Planner, Monthly Planner & Carer Self-Care.

Weekly Planner

Use this planner to organise appointments, caring responsibilities and your own wellbeing throughout the week.

Day	Appointments	Care Tasks	My To-Do List
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Monday			
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Tuesday			
---------	--	--	--

Wednesday			
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Thursday			
----------	--	--	--

Friday			
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Saturday			
----------	--	--	--

Sunday			
--------	--	--	--

Weekly Priorities

This week's most important tasks:

1.

2.

3.

4.

5.

Shopping List

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

Monthly Planner

Month: _____

Important Dates

Date	Event / Appointment
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Monthly Goals

Care Goals

Personal Goals

Things to Remember

Carer Self-Care

Being a carer is incredibly rewarding, but it can also be physically and emotionally exhausting. Looking after yourself isn't selfish—it's essential. The better you care for yourself, the better you'll be able to care for someone else.

This Week I Will...

- ☐ Take time to relax
- ☐ Get enough sleep
- ☐ Eat regular meals

- ☐ Drink enough water
- ☐ Go for a walk
- ☐ Speak to a friend or family member
- ☐ Read a book
- ☐ Watch a favourite TV programme or film
- ☐ Enjoy a hobby
- ☐ Ask for help if I need it
- ☐ Take a break without feeling guilty
- ☐ Celebrate something I've done well

My Self-Care Plan

Things that help me relax:

People I can talk to:

Things I enjoy doing:

Positive Reflection

Three things that went well this week

1.

2.

3.

One thing I'm proud of

One thing I'll do for myself next week

Notes

Next Section: Useful Resources, Final Notes, Disclaimer and About Safe Haven Connect CIC
CIC.

Useful Resources

Every caring journey is different. If you ever need additional advice or support, don't hesitate to reach out to healthcare professionals, local support services or trusted organisations.

Useful information to keep handy:

GP Surgery

Community Nurse

Social Worker

Pharmacy

Local Carers Support Service

Emergency Contact

Other Useful Numbers

Helpful Websites

Use this page to save websites and online resources you find useful.

My Important Notes

Use these pages for anything you want to remember.

Final Reflection

Being a carer is one of the most important roles anyone can have. It takes patience, strength, kindness and compassion.

Remember:

♥ You are doing your best.

♥ It's okay to ask for help.

♥ Looking after yourself is part of looking after someone else.

♥ You deserve support too.

Take one day at a time and celebrate the difference you make.

Disclaimer

This planner has been created by Safe Haven Connect CIC as an educational and organisational resource. It is not intended to replace professional medical, legal or financial advice.

Always seek guidance from an appropriately qualified healthcare professional or relevant organisation regarding medical concerns, treatment decisions, benefits, legal matters or emergencies.

If you or the person you care for is experiencing a medical emergency, contact your local emergency services immediately.

About Safe Haven Connect CIC

Safe Haven Connect CIC is a UK community interest company dedicated to making mental health support accessible to everyone.

Our platform provides free and low-cost wellbeing resources, including downloadable workbooks, practical self-help tools, anonymous chat rooms, mental health courses, breathing exercises, wellbeing activities and our AI wellbeing companion, Sage.

Our mission is to reduce isolation, improve wellbeing and ensure that nobody has to face life's challenges alone.



Website: <https://safehavenconnect.org>



Workbook Library: <https://safehavenconnect.org/workbooks>

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