Family Caregiver Checklist

Questions to Ask & Steps to Take Before Hiring a Caregiver

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Please note: This is an educational self-help tool, not legal, medical, or financial advice. Families make all hiring decisions and are responsible for their own due diligence. Senior Care Referral does not screen, refer, or recommend caregivers, and does not inspect, verify, or certify anyone.

Total items: 51. Check each item as you complete it.

1. Clarify your care needs first

- [ ] Who needs care, and what a typical day looks like now
- [ ] Daily tasks where help is needed (for example bathing, dressing, meals, housekeeping, companionship)
- [ ] Mobility needs, such as help walking, transferring, or preventing falls
- [ ] Memory or behavior changes the caregiver should know about
- [ ] Any health-related tasks, and whether the person's doctor says they need a licensed professional
- [ ] Days, hours, and whether overnight, live-in, or respite care is needed
- [ ] Whether transportation to appointments or errands is needed
- [ ] Languages, cultural preferences, and personal preferences that matter to your loved one
- [ ] Your budget and how you plan to pay
- [ ] When you need care to start, and whether the need is short-term or ongoing

2. Questions to ask each caregiver

- [ ] How long have you been a caregiver, and what kinds of clients have you cared for?
- [ ] Which of the tasks we need have you done before?
- [ ] Are you comfortable with memory loss, mobility help, or overnight care, if we need it?
- [ ] What is your availability, and how do you handle sick days or time off?
- [ ] Do you have reliable transportation, and are you willing to drive our loved one?
- [ ] What would you do in an emergency or if our loved one fell?
- [ ] How will you keep the family updated?
- [ ] Are you an independent caregiver or do you work through an agency or your own business?
- [ ] What is your rate, and what does it include?

3. Credentials and training to request and check

- [ ] Ask for copies of any license or certification the caregiver lists (for example CNA or HHA)
- [ ] Check each license or certification yourself with the organization that issued it
- [ ] Check that CPR or First Aid cards are current, if the caregiver lists them
- [ ] Ask about dementia, fall prevention, or other specialized training, and request proof if available
- [ ] If the caregiver works for an agency or business, ask for its license information and check it with the issuing body
- [ ] Compare what you were told with what the caregiver's listing says

4. References and work history

- [ ] Ask for at least two professional references, ideally from families or employers they cared for
- [ ] Call each reference yourself and ask about reliability, honesty, and quality of care
- [ ] Ask references whether they would hire the caregiver again
- [ ] Review the caregiver's work history and ask about any gaps
- [ ] Write down what each reference tells you

5. Background checks you arrange yourself

- [ ] Decide whether you want a background check, and what kind
- [ ] Get the caregiver's written permission before running any check
- [ ] Learn which rules apply to background checks you arrange before you start
- [ ] Choose how you will run the check (for example a background screening company)
- [ ] Understand what a check can and cannot show, and review results carefully
- [ ] If the caregiver offers a check they already have, confirm when and by whom it was done

6. Agreements to make before care starts

- [ ] Schedule: days, hours, and how changes or cancellations are handled
- [ ] Pay: hourly or daily rate, overtime, holidays, and how and when payment is made
- [ ] Duties: what is included and what is not
- [ ] Transportation: whose vehicle, mileage, and insurance
- [ ] Emergency plan: who to call, in what order, and where key information is kept
- [ ] Communication: how and how often the caregiver will update the family
- [ ] Household rules, privacy, and confidentiality expectations
- [ ] How either side can end the arrangement, and how much notice is expected
- [ ] Whether you may have employer responsibilities (ask a tax or legal professional)
- [ ] Insurance: ask the caregiver about any liability insurance and check your own coverage

7. Trial period and written agreement

- [ ] Agree on a short trial period and a date to review how it is going
- [ ] Put the agreed schedule, pay, duties, and other terms in writing
- [ ] Both sides sign and keep a copy of the written agreement
- [ ] Plan regular check-ins with the caregiver and your loved one
- [ ] Ask your loved one how they feel about the caregiver

Compare caregivers side by side

	Caregiver A	Caregiver B	Caregiver C
Name			
Phone / email			
Experience			
Credentials (checked with issuer?)			
References called			
Background check (arranged by you)			
Availability			
Rate			
Transportation			
Notes			

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