A plan that survives the visit.

Agree on next steps with your parent. Keep this with the household notes rather than treating an order or booking as a solved problem.

Date: _____ Plan agreed with: _____

ACTION 01

Exact room / issue: _____

Agreed next step: _____

Owner: _____ Due: _____

Stage: ☐ Requested ☐ Booked ☐ Completed ☐ Checked

ACTION 02

Exact room / issue: _____

Agreed next step: _____

Owner: _____ Due: _____

Stage: ☐ Requested ☐ Booked ☐ Completed ☐ Checked

ACTION 03

Exact room / issue: _____

Agreed next step: _____

Owner: _____ Due: _____

Stage: ☐ Requested ☐ Booked ☐ Completed ☐ Checked

Next check-in / backup person if an owner is unavailable:

Check what changed in daily life.

Return after the action is completed. Record your parent's experience and any open work before closing the item.

Action reviewed / date / person checking:

What my parent says about the change:

Remaining issue / next action / owner:

Question for the care team, assessor, or installer:

Keep private details in the right place

These are general household notes. Do not include medication instructions or private health information in a sheet shared with visitors. Agree who keeps the current copy.

SOURCE NOTES

Home-safety observations draw on CDC and Mayo Clinic guidance. Visit sequencing and family records are editorial tools, not clinically validated assessments. No clinician has individually reviewed this worksheet.

CDC / Check for Safety

https://www.cdc.gov/steadi/pdf/steadi-brochure-checkforsafety-508.pdf

Mayo Clinic / Fall prevention

https://www.mayoclinic.org/healthy-lifestyle/healthy-aging/in-depth/fall-prevention/art-20047358