

Monthly Care Alignment Meeting Template

A calmer, more professional worksheet for recurring caregiver-family check-ins and clearer agreements.

Name _____ Date _____

What is working well

CURRENT WINS

CALMER ROUTINES OR PATTERNS TO KEEP

WHAT IS HELPING MOST RIGHT NOW

What should improve

FRICTION AREAS

MISUNDERSTANDINGS TO RESOLVE

SUPPORT OR CLARIFICATION NEEDED

What changed recently

SCHEDULE CHANGES

BEHAVIOR OR CARE SHIFTS

PRIORITY CHANGES AFFECTING THE MONTH

Agreements made

NEW EXPECTATIONS

COMMUNICATION UPDATES

NEXT REVIEW DATE AND OWNER

CalmCare worksheet — designed for printing and filling out by hand or on screen.