

Work Agreement Prep Checklist

A practical worksheet for clarifying role scope, standards, boundaries, and logistics before a caregiver-family agreement is finalized.

Name _____

Date _____

Role scope and standards

CORE RESPONSIBILITIES

WHAT IS NOT INCLUDED BY DEFAULT

SERVICE STANDARDS THAT MATTER MOST

Schedule and logistics

NORMAL SCHEDULE

CHANGE NOTICE EXPECTATIONS

PICKUP / HANDOFF DETAILS

Communication and boundaries

URGENT-UPDATE RULES

WEEKLY CHECK-IN RHYTHM

PRIVACY / IN-HOME EXPECTATIONS

Money, outings, and edge cases

SPENDING APPROVALS

OUTING RULES

EMERGENCY FLEXIBILITY BOUNDARIES

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