Family Caregiver Skills Checklist

Teach-back and show-me sheets to confirm that a caregiver can safely do common tasks at home.

> **Purpose.** Use these sheets to confirm that a family caregiver can safely do a task taught by a licensed clinician. A signed sheet records a demonstration on one date. It is not a license, certification, or a promise of future safety. Each person's orders and care plan come first.

How to use this checklist

1. Choose only the skills this caregiver needs.
2. Review the patient's orders, equipment, and precautions. Cross out or change any step that does not fit.
3. Explain and show the task in small parts.
4. Ask the caregiver to show you on the real equipment, when safe.
5. Use the teach-back questions. Ask for answers in their own words.
6. Record the result and give the caregiver a copy.
7. Recheck after a change in condition, a new device, a hospital stay, or a safety concern.

Teach-back in brief

Do	Avoid
Say: "I want to be sure I explained this clearly." Ask: "Can you show me how you will do this at home?" Teach one part at a time, and check as you go. If it is not right, explain it another way and check again.	Asking "Do you understand?" or other yes-or-no questions. Treating it like a test of the caregiver. Accepting exact repetition as proof of understanding. Saving all checking for the end of the visit.

Rating guide

Rating	Meaning	What happens next
Shown	Done correctly and safely without prompting	Check the box for that step.
Needs practice	Done with reminders, but no safety risk	Coach and repeat before sign-off.
Not safe yet	A step could cause harm, or the caregiver cannot do it	Stop. Change the plan or arrange other help.

> **Stop rule.** If a caregiver cannot do a task safely, do not sign the sheet. Saying "I can't do this" is useful information. Consider more training, equipment, an aide, a nurse, therapy, or a change in the care plan. Do not send someone home with a task that is beyond their physical ability or emotional limits.

For clinicians: Medicare caregiver training services

Medicare Part B pays eligible practitioners for caregiver training that supports a patient's treatment plan. Rural Health Information Hub lists CPT 97550 and 97551 for individual functional training, 97552 for group functional training, and 96202 and 96203 for group behavior management training. It reports that the patient or representative must consent, that the service must be medically necessary, that standard Part B cost sharing applies, and that services must be face-to-face rather than telehealth. Confirm current codes, eligible practitioners, and documentation requirements with your Medicare Administrative Contractor before billing. This checklist does not establish medical necessity or guarantee payment.

Caregiver Readiness Profile

Patient ID	Caregiver name or code	Relationship
Clinician	Date	Preferred language; interpreter needed?
Patient or representative consent to training documented? Yes / No	Consent date	Other trained helpers

Ask	Notes
What tasks are you doing now? Which worry you most?	
Have you been shown how to do them?	
Do you have any lifting limits, vision, hearing, reading, or memory concerns?	
Is there a task you do not feel able or willing to do?	
Who can help, and who do you call after hours?	

Skill 1. Hand Hygiene and Gloves

Why it matters: Clean hands help prevent infection for both the patient and caregiver.

Before you begin: Have soap, water, clean towels, gloves, and a trash bag ready.

Show-me step	Shown	Needs practice	Not safe yet
1. Washes hands before and after care with soap and water, or uses hand sanitizer if hands are not visibly soiled.	☐	☐	☐
2. Rubs all surfaces, including backs of hands, between fingers, and under nails.	☐	☐	☐
3. Dries hands with a clean towel.	☐	☐	☐
4. Puts on new gloves for each task.	☐	☐	☐
5. Removes gloves inside out without touching the outside with bare skin.	☐	☐	☐
6. Bags and throws away used gloves.	☐	☐	☐
7. Washes hands again after removing gloves.	☐	☐	☐

Teach-back questions (ask in your own words)	When to get help
• When do you clean your hands during care? • Why do you not reuse gloves? • What do you do if gloves tear?	• Fever or signs of infection • Skin irritation or a latex or glove allergy • A sharps injury or blood exposure

Result	Trainer name and credential	Date	Recheck date
☐ Safe to do alone ☐ Safe with help ☐ Not ready			

Skill 2. Giving Medicines Safely

Why it matters: Medicine mistakes can cause falls, confusion, bleeding, low blood sugar, and hospital stays.

Before you begin: Use a current medicine list. Medicines, doses, and timing must come from the prescriber or pharmacist.

Show-me step	Shown	Needs practice	Not safe yet
1. Finds the current medicine list and explains what each medicine is for.	☐	☐	☐
2. Checks the right person, medicine, dose, time, and route.	☐	☐	☐
3. Compares the label with the list before giving.	☐	☐	☐
4. Measures liquids with the correct dosing device, not a kitchen spoon.	☐	☐	☐
5. Follows instructions about food, crushing, or splitting. Does not crush pills without approval.	☐	☐	☐
6. Records the medicine as given, or records why it was missed.	☐	☐	☐
7. Stores medicines safely and out of reach.	☐	☐	☐
8. Knows the plan for a missed dose.	☐	☐	☐

Teach-back questions (ask in your own words)	When to get help
• What would you do if you missed a dose? • What side effects will you watch for? • Who can you ask about a new over-the-counter medicine?	• Call the prescriber or pharmacist for side effects or medicine questions • Call Poison Help at 1-800-222-1222 for a wrong dose • Call 911 for trouble breathing, swelling of the face or throat, a seizure, or if the person will not wake up

Result	Trainer name and credential	Date	Recheck date
☐ Safe to do alone ☐ Safe with help ☐ Not ready			

Skill 3. Moving From Bed to Wheelchair

Why it matters: Unsafe transfers can injure both people. Only teach this method when the person can stand on at least one leg and has been cleared by the care team. Otherwise, a mechanical lift or another method is needed.

Before you begin: Clear the path, and put non-skid socks or shoes on the person.

Show-me step	Shown	Needs practice	Not safe yet
1. Explains each step to the person and invites them to help.	☐	☐	☐
2. Parks the wheelchair beside the bed, locks the brakes, and moves footrests aside.	☐	☐	☐
3. Helps the person sit up. Waits for dizziness to pass.	☐	☐	☐
4. Moves the person to the edge of the bed, with feet on the floor.	☐	☐	☐
5. Uses a gait belt if available and instructed. Stands close, with knees bent and back straight.	☐	☐	☐
6. Keeps the person's arms away from the caregiver's neck.	☐	☐	☐
7. Counts to three and stands slowly with the person.	☐	☐	☐
8. Pivots by moving the feet, without twisting the back.	☐	☐	☐
9. Lowers the person when the backs of their legs touch the seat.	☐	☐	☐
10. Knows to lower the person to the nearest safe surface if they start to fall.	☐	☐	☐

Teach-back questions (ask in your own words)	When to get help
• When would you stop and get help? • What would you do if they became dizzy? • Where do the person's arms go?	• The person cannot stand or take small steps • Pain or a new weakness • Any fall: contact the provider • Call 911 for serious injury

Result	Trainer name and credential	Date	Recheck date
☐ Safe to do alone ☐ Safe with help ☐ Not ready			

Skill 4. Turning, Repositioning, and Skin Checks

Why it matters: Pressure injuries can develop when weight stays on one area.

Before you begin: Ask the care team for the turning schedule. MedlinePlus advises changing position about every 2 hours in bed, unless the care team gives another plan.

Show-me step	Shown	Needs practice	Not safe yet
1. Explains the move and asks the person to help if able.	☐	☐	☐
2. Raises the bed if possible to protect the back, and lowers the side rail on the working side.	☐	☐	☐
3. Places one hand on the shoulder and one on the hip.	☐	☐	☐
4. Rolls the person smoothly, without dragging skin.	☐	☐	☐
5. Uses pillows so ankles and knees do not rest on each other.	☐	☐	☐
6. Keeps head and neck in line, and checks that arms are not trapped.	☐	☐	☐
7. Checks heels, ankles, knees, hips, spine, tailbone, elbows, shoulders, shoulder blades, back of head, and ears.	☐	☐	☐
8. Knows redness can be harder to see on darker skin. Also checks for warmth or for spongy or hard skin.	☐	☐	☐
9. Keeps sheets dry, smooth, and free of objects.	☐	☐	☐

Teach-back questions (ask in your own words)	When to get help
• How often will you change position? • What skin changes do you report? • Why do you avoid dragging?	• Redness, a sore, warmth, drainage, or pain • A skin change that does not improve • Fever with a wound

Result	Trainer name and credential	Date	Recheck date
☐ Safe to do alone ☐ Safe with help ☐ Not ready			

Skill 5. Toileting and Incontinence Care

Why it matters: Good care protects dignity, skin, and comfort.

Before you begin: Gather gloves, wipes, a clean product, a trash bag, and any barrier cream recommended.

Show-me step	Shown	Needs practice	Not safe yet
1. Provides privacy and explains each step.	☐	☐	☐
2. Offers the toilet on the planned schedule.	☐	☐	☐
3. Cleans hands and puts on gloves.	☐	☐	☐
4. Changes wet or soiled products promptly.	☐	☐	☐
5. Cleans from front to back, gently, and pats skin dry.	☐	☐	☐
6. Checks skin for redness or sores.	☐	☐	☐
7. Applies barrier product only if recommended.	☐	☐	☐
8. Bags waste, removes gloves, and washes hands.	☐	☐	☐
9. Tracks bowel and bladder changes.	☐	☐	☐

Teach-back questions (ask in your own words)	When to get help
• What changes would you report? • Should you limit fluids to prevent accidents? (Only if the care team says so.) • How do you protect the person's dignity?	• Pain or burning when urinating, fever, or blood • New incontinence or new confusion • Severe belly pain or vomiting with constipation: get urgent care or call 911 • Open skin

Result	Trainer name and credential	Date	Recheck date
☐ Safe to do alone ☐ Safe with help ☐ Not ready			

Skill 6. Safe Eating and Swallowing

Why it matters: Swallowing problems can lead to choking, dehydration, and pneumonia.

Before you begin: Follow the plan from the clinician or speech-language pathologist, including any food textures or thickened liquids.

Show-me step	Shown	Needs practice	Not safe yet
1. Seats the person fully upright for meals.	☐	☐	☐
2. Removes distractions, and allows enough time.	☐	☐	☐
3. Prepares food and drinks exactly as ordered.	☐	☐	☐
4. Offers small bites or sips, as instructed.	☐	☐	☐
5. Waits for each swallow before offering more.	☐	☐	☐
6. Watches for coughing, a wet voice, or food held in the cheek.	☐	☐	☐
7. Keeps the person upright for at least 20 minutes after eating.	☐	☐	☐
8. Gives mouth care after meals, as directed.	☐	☐	☐

Teach-back questions (ask in your own words)	When to get help
• What signs mean swallowing is getting worse? • What will you do if the person starts choking? • Can you change a texture on your own? (No, ask first.)	• Coughing during meals, weight loss, or fever: call the same day • Choking and unable to breathe, speak, or cough: call 911

Result	Trainer name and credential	Date	Recheck date
☐ Safe to do alone ☐ Safe with help ☐ Not ready			

Skill 7. Checking Blood Sugar and Responding to Lows

Why it matters: Low blood sugar can quickly become dangerous, especially for people using insulin or certain diabetes medicines.

Before you begin: Use the meter instructions and written diabetes plan. Enter target ranges and the plan here: _____

Show-me step	Shown	Needs practice	Not safe yet
1. Cleans hands and prepares the meter and supplies.	☐	☐	☐
2. Checks the strips are in date and fit the meter.	☐	☐	☐
3. Completes the check following device instructions.	☐	☐	☐
4. Disposes of the lancet in a sharps container.	☐	☐	☐
5. Records the reading and time.	☐	☐	☐
6. Can name the person's signs of low blood sugar.	☐	☐	☐
7. Explains the written plan for low blood sugar. CDC's general rule for someone awake and able to swallow is 15 grams of fast-acting sugar, then recheck in 15 minutes.	☐	☐	☐
8. Knows never to give food or drink to someone who is passing out or cannot swallow.	☐	☐	☐

Teach-back questions (ask in your own words)	When to get help
• What number is too low for this person? • What will you give, and how much? • What will you do if they cannot swallow?	• Repeated low or high readings • Missed insulin or diabetes medicine • Call 911 if the person passes out, has a seizure, or cannot swallow, or if glucagon was given

Result	Trainer name and credential	Date	Recheck date
☐ Safe to do alone ☐ Safe with help ☐ Not ready			

Skill 8. Daily Weight and Heart Failure Symptoms

Why it matters: A sudden weight gain can be an early sign of fluid buildup.

Before you begin: Enter the care team's call-in weight gain here: _____

Show-me step	Shown	Needs practice	Not safe yet
1. Uses the same scale on a hard, flat surface.	☐	☐	☐
2. Weighs the person at the same time each morning.	☐	☐	☐
3. Weighs after toileting and before breakfast, in similar clothing.	☐	☐	☐
4. Writes down the weight.	☐	☐	☐
5. Checks for swelling, cough, and breathing changes.	☐	☐	☐
6. Knows the fluid and salt plan, if ordered.	☐	☐	☐
7. Knows which number to call.	☐	☐	☐

Teach-back questions (ask in your own words)	When to get help
• How much weight gain means you call? • What other symptoms would you report? • What should you do before giving an over-the-counter pain reliever?	• Gain of more than 2 to 3 pounds in a day or 5 pounds in a week, or the amount in the care plan • Call 911 for chest pain, fainting, or severe trouble breathing

Result	Trainer name and credential	Date	Recheck date
☐ Safe to do alone ☐ Safe with help ☐ Not ready			

Skill 9. Home Oxygen Safety

Why it matters: Oxygen makes fires burn faster and hotter. It is prescribed like a medicine.

Before you begin: Follow the prescriber's flow rate and the equipment supplier's instructions.

Show-me step	Shown	Needs practice	Not safe yet
1. Does not change the flow rate unless the prescriber says to.	☐	☐	☐
2. Keeps smoking away. No one smokes in a room where oxygen is used.	☐	☐	☐
3. Posts NO SMOKING signs.	☐	☐	☐
4. Keeps oxygen at least 6 feet from open flames, candles, stoves, heaters, and similar sources.	☐	☐	☐
5. Keeps working smoke detectors and a fire extinguisher.	☐	☐	☐
6. Keeps oily, greasy, or alcohol-based products away from oxygen.	☐	☐	☐
7. Avoids petroleum-based products on the face or upper body unless approved.	☐	☐	☐
8. Stores oxygen where air can circulate, not in a closet, box, or trunk.	☐	☐	☐
9. Keeps tubing out of walkways.	☐	☐	☐
10. Knows the supplier's phone number and backup plan for a power outage.	☐	☐	☐

Teach-back questions (ask in your own words)	When to get help
• What keeps oxygen safe from fire? • Who would you call if equipment stopped working? • What is your plan in a power outage?	• Call the supplier for equipment problems • Call the care team for worse breathing or new confusion • Call 911 for severe trouble breathing or blue lips

Result	Trainer name and credential	Date	Recheck date
☐ Safe to do alone ☐ Safe with help ☐ Not ready			

Skill 10. What to Do After a Fall

Why it matters: Your first actions can prevent further harm.

Before you begin: Agree on a plan for lifting, since a caregiver should not lift an adult alone.

Show-me step	Shown	Needs practice	Not safe yet
1. Stays calm and checks whether the person is awake and breathing.	☐	☐	☐
2. Calls 911 for unconsciousness, heavy bleeding, severe pain, or a possible head, neck, back, or hip injury.	☐	☐	☐
3. Does not move the person if a serious injury is possible, unless there is immediate danger.	☐	☐	☐
4. Keeps the person warm while waiting.	☐	☐	☐
5. Asks about pain and looks for injury if no emergency is present.	☐	☐	☐
6. Uses a safe method taught by the care team to help the person up, or calls for help.	☐	☐	☐
7. Tells a clinician right away about a head strike if the person takes a blood thinner.	☐	☐	☐
8. Writes down what happened and reports it.	☐	☐	☐

Teach-back questions (ask in your own words)	When to get help
• When will you call 911? • What will you say about blood thinners? • Who will you tell, even if there is no injury?	• Call the clinician after any fall • Call 911 for the signs above, or repeated vomiting, worsening headache, confusion, or a seizure after a head strike

Result	Trainer name and credential	Date	Recheck date
☐ Safe to do alone ☐ Safe with help ☐ Not ready			

Skill 11. Reporting a Change Clearly

Why it matters: A clear report helps a clinician decide what to do quickly.

Before you begin: Keep important phone numbers, the medicine list, and the care plan together.

Show-me step	Shown	Needs practice	Not safe yet
1. Says who is calling and who the patient is.	☐	☐	☐
2. Describes what changed and when it started.	☐	☐	☐
3. Gives readings if available: temperature, blood sugar, weight, or blood pressure.	☐	☐	☐
4. Says what is normal for this person.	☐	☐	☐
5. Reports recent falls, medicine changes, eating, drinking, and toileting.	☐	☐	☐
6. Writes down the instructions received, and reads them back.	☐	☐	☐
7. Knows when to call 911 instead of waiting.	☐	☐	☐

Teach-back questions (ask in your own words)	When to get help
• What would you say if you called right now? • What number do you call after hours? • What will you have ready when 911 arrives?	• Daytime: _____ • After hours: _____ • Emergency: 911

Result	Trainer name and credential	Date	Recheck date
☐ Safe to do alone ☐ Safe with help ☐ Not ready			

Skill 12. Task Assigned by the Clinician

Use this blank sheet for tasks that depend on orders and equipment, such as wound care, injections, feeding tubes, catheters, or ostomy care. The clinician writes the steps. Do not use a task from another patient's plan.

Task Equipment and supplies Order or plan reviewed

Show-me step	Shown	Needs practice	Not safe yet

Teach-back questions

When to get help

Result	Trainer name and credential	Date	Recheck date
☐ Safe to do alone ☐ Safe with help ☐ Not ready			

Skills Summary Record

Patient ID | Caregiver name or code | Primary clinician

Skill	Needed ?	Result	Date	Trainer initials	Recheck
1. Hand hygiene and gloves	☐				
2. Giving medicines safely	☐				
3. Bed to wheelchair	☐				
4. Turning and skin checks	☐				
5. Toileting and incontinence care	☐				
6. Eating and swallowing	☐				
7. Blood sugar and lows	☐				
8. Daily weight and heart failure	☐				
9. Home oxygen safety	☐				
10. After a fall	☐				
11. Reporting a change	☐				
12. Clinician-assigned task:	☐				

Organization review (complete before first use)

This checklist should be reviewed by a licensed clinician in your organization and adapted to your scope, policies, and patients.

Reviewed by (name, credential) | Organization | Date | Next review date

Free how-to videos for caregivers

AARP and the Home Alone Alliance offer how-to videos on topics such as mobility, medicines, wound care, incontinence, equipment, and special diets. Many are available in Spanish.

Sources and further reading

AHRQ: Teach-Back (ahrq.gov)

Rural Health Information Hub: Caregiver Training Services (ruralhealthinfo.org)

MedlinePlus: Moving a patient from bed to a wheelchair (medlineplus.gov)

MedlinePlus: Turning patients over in bed (medlineplus.gov)

MedlinePlus: Preventing pressure injuries (medlineplus.gov)

MedlinePlus: Oxygen safety (medlineplus.gov)

CDC: Treatment of low blood sugar (cdc.gov)

American Heart Association: Managing heart failure symptoms (heart.org)

NIOSH: Homecare Workers' Handbook (cdc.gov)

Family Caregiver Alliance: Family caregiving how-to video series (caregiver.org)

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