TEMPLATE P

Backup Plan Handoff Document

Use with Chapter 20.3.

Section	Entry
Backup coordinator / second backup (names, phones, role)	
Current status (one paragraph)	
Care schedule and agency contact	
Medications: pharmacy, next pack delivery, refill process	
Appointments, next 60 days, with transportation	
Bills: autopay list, manual bills, care credit card, triage owner	
Access: password manager emergency access, shared folder, lockbox, keys, portals	
Escalation order (911 / doctor / hospice / agency / family)	
Open items (claims, applications, repairs, decisions)	
Last tested (date)	