

❖ The Lodestone Care Log

A month-by-month record of the care you provide — because care you can prove counts in ways care you can't prove never will.

Why keep this log

Almost every program that helps family caregivers runs on documentation: Medicaid's **caregiver child exemption** (which can let a parent's home pass to a live-in caregiving child) requires proof of two years of care and coresidence, and states ask for contemporaneous care logs — records made at the time, not reconstructed later. **Caregiver contracts** require timesheets that match the agreement. **Tax deductions** and reimbursement programs ask what you spent and when. And in **family meetings**, a written inventory of the actual work replaces dueling impressions with a list. One month per set of pages; photocopy or reprint as needed, and keep every completed month together in one folder.

How to use it (five minutes a day, honestly kept)

1. Fill in the **daily log** as you go — task codes and hours. Round honestly; understating helps nobody and overstating can discredit the whole record.
2. At month's end, complete the **monthly summary** and sign and date it. A contemporaneous signature strengthens the record.
3. Track **expenses and appointments** on the last page; staple receipts behind it.
4. Keep the **evidence extras** below in the same folder as the completed months.
5. If the Medicaid exemption may ever matter to your family, show this folder to an elder law attorney early — they will tell you what your state wants added.

Evidence extras worth saving alongside this log

- ☐ Utility bills, driver's license, or tax returns showing the caregiver's address at the home (coresidence proof, each year)
- ☐ A dated letter from the parent's physician describing the care needed and who provides it (ask at a regular visit; update yearly)
- ☐ Pharmacy printouts of refill history (free on request — they corroborate medication management)
- ☐ Appointment summaries / after-visit records showing who brought the parent in
- ☐ Receipts for care-related purchases (supplies, equipment, home modifications)
- ☐ Names of neighbors or relatives who see the care firsthand and could later provide an affidavit

This worksheet is information, not legal advice. What your state's Medicaid agency accepts is a question for an elder law attorney in your state (naela.org finds certified ones). The full explanation lives at lodestone.guide/guide/caregiver-child-exemption.html.

Monthly summary

Month / year: _____

Caregiver: _____

Person receiving care: _____

Address where care is
provided: _____

Care provided this month	Days	Approx. hours
Bathing, dressing, grooming, toileting		
Meals — planning, cooking, feeding help		
Medications — organizing, administering, refills		
Mobility — walking help, transfers, fall watch		
Supervision / safety presence (incl. overnight)		
Medical tasks — wound care, injections, monitoring		
Transportation — appointments, errands		
Household — laundry, cleaning, bills, paperwork		
Other:		
Month totals		

What changed this month (new diagnoses, new needs, incidents, falls, hospital visits):

Completed by (signature): _____

Date: _____

Signing each month, at the time, is part of what makes this a contemporaneous record rather than a reconstruction.

Daily log

Task codes: B bathing/grooming · D dressing · T toileting · M meals · X medications · W walking/transfers · S supervision · N medical/nursing task · R transportation/errands · H household · A appointment · O other (note it)

Day	Task codes	Hours	Notes (what happened, anything unusual)
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			
21			
22			
23			
24			
25			
26			
27			
28			
29			
30			
31			

Expenses & appointments

Out-of-pocket expenses this month (staple receipts behind this page)

*Categories: medical · supplies · food · transportation · home modification · utilities share · other. AARP's research puts the average caregiver's out-of-pocket spending at \$7,242/year — tracking yours is how any of it comes back.

Appointments & professional contacts this month

[illegible]

Free help exists for the work this log records: your Area Agency on Aging (1-800-677-1116 · eldercare.acl.gov) funds respite, counseling, and caregiver training through the National Family Caregiver Support Program. The full guide to caring for a parent in your home: lodestone.guide/guide/moving-in.html