

Annual Family Animal Plan Review Checklist

An educational tool to help Family Animal Parents keep continuity of care planning accurate, current, and ready when it is needed most. Most reviews can be completed in about fifteen minutes.

Section 1: Primary Caregiver Review

- ☐ Caregiver full name confirmed
- ☐ Caregiver phone number current
- ☐ Caregiver email current
- ☐ Caregiver address current
- ☐ Caregiver remains willing and available
- ☐ Caregiver knows where planning documents are stored
- ☐ Caregiver has access to home, keys, or entry codes if needed

Section 2: Backup Caregiver Review

- ☐ Backup caregiver full name confirmed
- ☐ Backup caregiver phone number current
- ☐ Backup caregiver email current
- ☐ Backup caregiver remains willing and available
- ☐ Backup caregiver understands their role
- ☐ Backup caregiver knows where planning documents are stored

Section 3: Veterinary Review

- ☐ Primary veterinarian name and phone current
- ☐ Emergency veterinary hospital name and phone current
- ☐ Vaccination information up to date
- ☐ Recent wellness exam on file
- ☐ Insurance information current (if applicable)
- ☐ Microchip registration current

Section 4: Medication Review

- ☐ Current medication list reviewed and accurate
- ☐ Dosages and schedules current
- ☐ Allergies documented
- ☐ Chronic medical conditions documented
- ☐ Supply on hand checked and refilled as needed
- ☐ Medication storage location noted for caregivers

Section 5: Emergency Contact Review

- ☐ Primary caregiver contact verified
- ☐ Backup caregiver contact verified
- ☐ Veterinarian contacts verified
- ☐ Trusted family member or friend contact verified
- ☐ Neighbor contact verified (if applicable)
- ☐ Out of area contact verified (if applicable)

Section 6: Emergency Go Bag Review

- ☐ Food supply checked and within use by date
- ☐ Water supply refreshed
- ☐ Medications checked and within expiration date
- ☐ Treats and comfort items refreshed
- ☐ Leash, harness, collar, and ID tag in place
- ☐ Carrier or crate ready and accessible
- ☐ Bowls, waste bags, and basic supplies stocked
- ☐ Copy of medical records included and current
- ☐ Copy of emergency contact list included and current
- ☐ Recent photo of Family Animal included

Section 7: Family Animal Emergency ID Card Review

- ☐ Family Animal name and description current
- ☐ Photo current
- ☐ Medical alerts current
- ☐ Caregiver contact information current
- ☐ Veterinarian contact information current
- ☐ Card carried in wallet, vehicle, or accessible location

Section 8: Housing and Relocation Review

- ☐ Current housing situation documented
- ☐ Housing rules or pet policies reviewed
- ☐ Relocation preferences for the Family Animal updated
- ☐ Boarding or temporary housing options identified
- ☐ Travel or transportation plan noted

Housing or relocation notes

Section 9: Planning Document Review

- ☐ Essential Care Plan reviewed and current
- ☐ Life Transitions Plan reviewed and current
- ☐ Legacy Care Plan reviewed and current
- ☐ Emergency Family Animal Care Planning Authorization current
- ☐ Successor Family Animal Guardian Designation current
- ☐ Backup Caregiver Instructions current
- ☐ Veterinary Information and Medical Record Summary current
- ☐ Documents stored where caregivers can find them

Section 10: What's Changed Since Last Year?

Life changes over time, and so do the needs of Family Animals and their caregivers. Use this section to record important updates since your last annual review.

Changes in Caregivers

- ☐ New primary caregiver selected
- ☐ New backup caregiver selected
- ☐ Caregiver contact information changed
- ☐ Caregiver availability changed
- ☐ Caregiver moved
- ☐ Caregiver no longer able to serve

Notes

Changes in Veterinary Care

- ☐ New veterinarian
- ☐ New emergency veterinary hospital
- ☐ New specialist
- ☐ Veterinary contact information changed
- ☐ Insurance information changed

Notes

Changes in Medical Needs

- ☐ New medication
- ☐ Medication discontinued
- ☐ New medical diagnosis
- ☐ New allergy
- ☐ Surgery or major procedure
- ☐ Change in mobility, hearing, or vision
- ☐ New behavioral concern

Notes

Changes in Family Animal Information

- ☐ New Family Animal added to household
- ☐ Family Animal passed away
- ☐ Updated microchip information
- ☐ Updated identification records
- ☐ Updated photographs

Notes

Changes in Housing and Relocation Planning

- ☐ Moved to a new home
- ☐ New housing restrictions
- ☐ Relocation planned
- ☐ Temporary housing changes
- ☐ New evacuation considerations

Notes

Changes in Emergency Preparedness

- ☐ Emergency contacts updated
- ☐ Emergency go bag updated
- ☐ Family Animal Emergency ID Card updated
- ☐ Emergency caregiver instructions updated
- ☐ Emergency Authorization reviewed

Notes

Changes in Financial and Planning Considerations

- ☐ Insurance changes
- ☐ Budget changes affecting care

- ☐ Trust or estate planning updates
- ☐ Guardian designation changes
- ☐ Long term care funding changes

Notes

Year in Review Summary

What were the most important changes affecting your Family Animal's future care this year?

Action Items for the Coming Year

What updates still need to be completed?

- ☐ Update caregiver information
- ☐ Update veterinary information
- ☐ Update medications
- ☐ Review planning documents
- ☐ Update emergency contacts
- ☐ Update Family Animal Emergency ID Card
- ☐ Review emergency preparedness supplies
- ☐ Other:

Section 11: Annual Notes**Changes since last review**

Items needing follow up

People informed of updates

Section 12: Review Completion**Review completed by**

Review completion date**Next review date (recommended within 12 months)**

A continuity of care plan works best when it evolves with your Family Animal's life and your family's changing circumstances.

This checklist is provided for educational and preparedness purposes only and does not constitute legal, medical, veterinary, or emergency management advice. Users should consult appropriate professionals regarding their individual circumstances.