



# Just-in Time Caregiving Checklist



**1. Do you need a break from your role as caregiver, so you can take care of yourself and have the energy you need to be an effective caregiver?**

a. If yes, here are some caregiving resources to help find adult daycare and respite services

- Caring.com  
<https://www.caring.com/local/adult-day-care>
- A Place for Mom  
<http://www.aplaceformom.com/respice-care>
- ARCH National Respite Network  
<http://archrespice.org/respitelocator>



**2. Is caregiving causing you to feel isolated? Look for caregiver support groups in your local area or online.**

a. If yes, look for caregiver support groups in your local area or online. Here are some resources to get you started.

- Alzheimer's Association  
[http://www.alz.org/apps/we\\_can\\_help/support\\_groups.asp](http://www.alz.org/apps/we_can_help/support_groups.asp)
- Caring.com  
<https://www.caring.com/support-groups>
- Family Caregiver Alliance  
<https://www.caregiver.org/support-groups>



**3. What type of daily care does your loved one require?**

a. Do you need to enlist the help of a professional caregiver, a home companion, or a home maker?

- CareLinx  
[www.carelinx.com](http://www.carelinx.com)
- Caring.com  
[www.caring.com](http://www.caring.com)

- Home Team  
[www.hometeam.com](http://www.hometeam.com)

- Honor  
[www.joinhonor.com](http://www.joinhonor.com)

**b. Does your loved one need in-home medical care (home health care)?**

*i. Do they need Skilled Health Care Services?*

1. If yes, here are some resources:

- Caring.com
- National Association for Home Care and Hospice
- Visiting Nurse Associations of America
- Medicare Home Health Compare

*ii. What in-home medical equipment do they need for that care?*

1. Resources:

- Medicare.gov Supplier Directory  
[www.medicare.gov/supplierdirectory](http://www.medicare.gov/supplierdirectory)

*iii. Do you need training to help with that care?*

1. Resources:

- Alzheimer's Association Care Training Resources  
[www.alz.org/care/alzheimers-dementia-care-training-certification.asp](http://www.alz.org/care/alzheimers-dementia-care-training-certification.asp)
- Healios  
[www.myhealios.com](http://www.myhealios.com)
- American Red Cross- Family Caregiver Training Program  
<http://www.redcross.org/take-a-class>

**c. Do you or your loved one need assistance with grocery shopping and/or meals?**

1. Resources:

Community Meal Program:

- Meals on Wheels  
[www.mealsonwheelsamerica.org](http://www.mealsonwheelsamerica.org)

2. Home-Delivered Meals/groceries:

- 50+ Places to Buy Groceries Online

<http://mashable.com/2008/06/05/online-grocery-shopping/#GjPb8Ob2GkqK>

- Silver Cuisine

<http://silver.bistromd.com/>

d. Do you or your loved one need assistance with transportation?

1. Resources:

- Caring.com

<https://www.care.com/senior-transportation>

- National Aging and Disability Transportation Center

[www.nadtc.org](http://www.nadtc.org)



**4. Do you want help in determining what daily care services could best help your loved one?**

a. If yes, here are some Geriatric Care Manager resources to find help:

- Aging Life Care Association

[http://www.aginglifecare.org/ALCA/About\\_Aging\\_Life\\_Care/Fin\\_an\\_Aging\\_Life\\_Care\\_Expert/ALCA/About\\_Aging\\_Life\\_Care/Search/Find\\_an\\_Expert.aspx](http://www.aginglifecare.org/ALCA/About_Aging_Life_Care/Fin_an_Aging_Life_Care_Expert/ALCA/About_Aging_Life_Care/Search/Find_an_Expert.aspx)

- Caring.com

<https://www.caring.com/local/geriatric-care-managers>

- National Care Planning Council

<https://www.longtermcarelink.net/a2bfindmanager.html>

- Look up your local Aging and Disability Resource Center through the National Association for Area Agencies on Aging

<http://www.n4a.org/>

**5. Is your loved one aging in place at either their residence or yours?**

a. If yes, does the space accommodate someone with limited mobility?

*i. To make sure, download Caring Village's free Home Preparedness and Maintenance Checklist  
<http://info.caringvillage.com/>*

**6. Do you need to find housing (such as Assisted Living Residences, Continuing Care Retirement Communities, Nursing Homes) for your loved one?**

a. If yes, here are some resources to find housing:

1. Resources:

- A Place for Mom  
[www.aplaceformom.com](http://www.aplaceformom.com)
- Caring.com  
<https://www.caring.com/local>
- Medicare Nursing Home Compare  
<https://www.medicare.gov/nursinghomecompare/search.html>

**7. Do you need financial assistance to cover your caregiving costs?**

1. Resources:

- Benefits Check Up  
<https://www.benefitscheckup.org/>
- Paying for Senior Care.com  
<https://www.payingforseniorcare.com/longtermcare/resources/cash-and-counseling-program.html>

a. Are you caring for a veteran?

1. Additional Resource:

- VA Caregiver Support  
<http://www.caregiver.va.gov/>



**8. Have you taken care of your loved one's finances by:**

- a. Accumulating your loved one's essential papers and records (including Driver's Licenses, Social Security Cards, Marriage Certificates, Marital Agreements, Passports, Death Certificates, Military ID's, Military Service Records, Living Will, Wills, Trusts, Titles, etc.)?
- b. Establishing a list of important financial information (including assets, liabilities/debts, Credit Cards, Tax Returns, etc.)?
- c. Organizing Contact Information for Financial and Legal Professionals (including Financial Advisors, CPA's, Attorneys, etc.)
- d. Creating a Financial Power of Attorney?

*i. To ensure you have everything you need, download Caring Village's free Financial, Medical, Legal, and Estate Planning Caregiver Checklist  
<http://info.caringvillage.com/financial-checklist/>*



**9. Have you collected all of your loved one's important medical information including:**

- a. Contact information for Doctors, Pharmacies, and Pharmacists?
- b. A list of their medications, past medical procedures, allergies, and blood type?
- c. Health Insurance information (Medicare/Medicaid/Insurance Coverage Cards, Long Term Care Insurance, Disability Insurance)
- d. Copies of important documents such as Living Wills/Health Care Power of Attorneys/Advanced Medical Directives, DNR's, Organ Donor Cards, Organ Donation Preferences, etc.

*i. To ensure you have everything you need, download Caring Village's free Financial, Medical, Legal, and Estate Planning Caregiver Checklist  
<http://info.caringvillage.com/financial-checklist/>*

**10. Has your loved one provided their Doctors and other healthcare providers with written authorization (HIPAA Release Form) so you can access their medical information in accordance with the Health Insurance Portability and Accountability Act (HIPAA)?**

a. There are no standard HIPAA consent forms, since these vary depending on location, so it is best to reach out directly to the medical offices that your loved one frequents to get the appropriate forms.

i. *Caregiver Tip: When you obtain written release authorizations from the healthcare providers, have your loved one in your care sign it, and keep two copies -- one for you and one for the person you're caring for. Then return the signed forms to the providers' offices. Repeat this process every time you or the person in your care is about to enter a hospital or visit a new doctor.*

**11. Have you taken care of your loved one's Legal and Estate Planning including Incapacity Protection, Probate Avoidance, Distribution Planning, Estate Tax Planning, Living Will Declaration, Last Will and Testament, Final Arrangements, Revocable and Irrevocable Trusts, etc.?**

a. To ensure you have everything you need, download this [FREE Family Caregiver Guide Checklist](http://www.caringvillage.com/resources) [www.caringvillage.com/resources](http://www.caringvillage.com/resources)

1. Resources:

- Law Depot  
[www.lawdepot.com](http://www.lawdepot.com)
- Legal Zoom  
[www.legalzoom.com](http://www.legalzoom.com)

**12. Have you established a list of important personal contacts including spouses, children, other family members, decision-makers, beneficiaries etc.?**

a. To ensure you have everything you need, download Caring Village's free [Financial, Medical, Legal, and Estate Planning Caregiver Checklist](http://info.caringvillage.com/financial-checklist/) (<http://info.caringvillage.com/financial-checklist/>)

**13. Have you properly stored all essential papers and records in a safe location (such as a fireproof/waterproof box or a Safe Deposit Box)?**

**14. Have you researched Caregiver resources in your local area?**

a. If no, here are some resources:

- National Association of Area Agencies on Aging  
<http://www.n4a.org/>
- National Respite Network  
<https://archrespite.org/index.php>

**15. Have you established an informal caregiving team to help you shoulder your caregiving responsibilities?**

a. If no, consider using Caring Village, a caregiving mobile app and dashboard that makes it easier, safer, and less stressful to communicate, collaborate, and coordinate caregiving activities.

# Glossary Terms

**Activities of Daily Living:** Activities of daily living (ADL) are routine activities that people tend to do every day without needing assistance. There are six basic ADLs: eating, bathing, dressing, toileting, transferring (walking) and continence. A person's ability to perform ADLs is important for determining what type of long-term care – for example nursing-home care or in-home care – and health coverage the person needs such as Medicare, Medicaid or long-term care insurance (via Investopedia).

**Adult Day Care:** Adult Day Care Centers also allow hard-working caregivers get a much needed break from the stresses of caring for seniors. With the assistance of Adult Day Care, caregivers will have time to relax or catch up on errands that have fallen by the wayside with their busy, stressful schedules. Adult Day Care Centers give seniors the opportunity to meet new people and socialize with other seniors. In addition to the social aspect, Adult Day Care also gives seniors the opportunity to participate in new activities and exercise programs that they do not have when living alone (via A Place for Mom).

**Assisted Living Residences:** An assisted living residence is a long-term senior care option that provides personal care support services such as meals, medication management, bathing, dressing and transportation (via A Place for Mom).

**Caring Village:** Caring Village is a first-of-its kind online mobile app and dashboard that allows families to communicate, collaborate, and coordinate caregiving activities. Users can build an online village for their loved ones and invite family members, friends, neighbors, and professional caregivers to participate in their care. Caring Village features a wellness journal, a centralized calendar of events, sharable to-do lists with reminders, customizable care plans, secure in-app messaging, and caregiver preparedness checklists that make it easier, safer, and less stressful to care for an aging loved one (via Caring Village).

**Caregiving Team:** A Caregiver's trusted informal network who helps them provide care to their loved one. This can include family members, friends, neighbors, professional caregivers, etc. (via Caring Village).

**Conservator:** A guardian and protector appointed by a judge to protect and manage the financial affairs and/or the person's daily life due to physical or mental limitations or old age. The conservator may be only of the "estate" (meaning financial affairs), but may be also of the "person," when he/she takes charge of overseeing the daily activities, such as health care or living arrangements of the conservatee (via the Free Dictionary).

**Continuing Care Retirement Communities:** Part independent living, part assisted living and part skilled nursing home, CCRCs offer a tiered approach to the aging process, accommodating residents' changing needs. Upon entering, healthy adults can reside independently in single-family homes, apartments or condominiums (via AARP).

**DNR (Do Not Resuscitate) Order:** A do-not-resuscitate order, or DNR order, is a medical order written by a doctor. It instructs health care providers not to do cardiopulmonary resuscitation (CPR) if a patient's breathing stops or if the patient's heart stops beating. A DNR order is created, or set up, before an emergency occurs. A DNR order allows you to choose whether or not you want CPR in an emergency. It is specific about CPR. It does not have instructions for other treatments, such as pain medicine, other medicines, or nutrition. The doctor writes the order only after talking about it with the patient (if possible), the proxy, or the patient's family (via MedlinePlus).

**Financial Power of Attorney:** A financial power of attorney is a particular type of POA that authorizes someone to act on your behalf in financial matters. Many states have an official financial power of attorney form (via Legal Zoom).

**Geriatric Care Manager:** A professional geriatric care manager has been educated in various fields of human services — social work, psychology, nursing, gerontology — and trained to assess, plan, coordinate, monitor and provide services for the elderly and their families. Advocacy for older adults is a primary function of the care manager (via the New York Times).

**Guardian:** A person who looks after and is legally responsible for someone who is unable to manage their own affairs, especially an incompetent or disabled person or a child whose parents have died (via Dictionary.com).

**Health Care Power of Attorney (HCPA, Health Care Proxy):** The health care power of attorney is a document in which you designate someone to be your representative, or agent, in the event you are unable to make or communicate decisions about all aspects of your health care. In the most basic form, a health care power of attorney merely says, "I want this person to make decisions about my health care if I am unable to do so" (via legalzoom).

**HIPAA (Health Insurance Portability and Accountability Act):** HIPAA is a federal law that sets out rules for sharing personal medical information and protecting it from unauthorized uses. It applies to information collected in hospitals, doctors' offices, and other places that provide health care as well as to the businesses that help providers manage and store the data. The information may be on paper or in an electronic health record. The law allows people who are directly involved in the care of a patient or payment for services to see this information (via Next Step in Care).

**HIPAA Release Form:** The HIPAA law requires doctors and other healthcare providers to get written authorization from a patient before they can share most health information about him or her with a “third party” -- and that includes relatives and caregivers. (via Privacy Rights Clearinghouse)

**Home Health Aide:** Home health aides help people with disabilities, chronic illness, or cognitive impairment with activities of daily living. They often help older adults who need assistance. In some states, home health aides may be able to give a client medication or check the client’s vital signs under the direction of a nurse or other healthcare practitioner (via Bureau of Labor Statistics).

**Homemaker Services:** Homemaker services provide assistance to persons with the inability to perform one or more of the following activities of daily living: preparing meals, shopping for personal items, managing money, using the telephone or doing light housework (via Virginia Department for Aging and Rehabilitative Services).

**Instrumental Activities of Daily Living (IADL):** Instrumental activities of daily living are the activities that people do once they are up, dressed, put together. These tasks support an independent lifestyle. Many people can still live independently even though they need help with one or two of these IADL’s. Some examples of IADLs include cooking, driving, using the telephone or computer, shopping, keeping track of finances, and managing medications (via As Our Parents Age).

**Nursing Homes:** A nursing facility that provides intermediate care (assistance with personal care and activities of daily living) or skilled care (24-hour medical, nursing and rehabilitation care); often a transition from hospital to home (via AARP).

**Palliative Care:** Palliative care (pronounced pal-lee-uh-tiv) is specialized medical care for people with serious illness. It focuses on providing relief from the symptoms and stress of a serious illness. The goal is to improve quality of life for both the patient and the family. Palliative care is provided by a specially-trained team of doctors, nurses, social workers and other specialists who work together with a patient’s doctors to provide an extra layer of support. It is appropriate at any age and at any stage in a serious illness and can be provided along with curative treatment (via Get Palliative Care).

**Personal Care Services:** personal care services (PCS) allow many elderly people and those with disabilities or chronic or temporary conditions to remain in their homes and maintain basic quality of life. PCS includes things such as bathing, light housework, and meal preparation (via Office of the Inspector General).

**Respite Care:** Respite care is a break from providing care for a loved one. It can be provided by either family, friends, or through programs such as attending an adult day services center. You can also have a paid home care worker come to the home (via AARP).

**Skilled Health Care Services:** Skilled Care is health care given when you need skilled nursing or therapy staff to treat, manage, observe, and evaluate your care. Examples of SNF care include intravenous injections and physical therapy. Care that can be given by non-professional staff isn't considered skilled care (via Medicare.gov).