



Caregiving 101 Checklist





So now you are a caregiver. We've been there and we know that you're probably feeling stressed, overwhelmed, and alone with no idea how or where to begin. This is where our Caregiving 101 checklist can help you. This checklist will help you identify your needs, assemble a caregiving team, find numerous resources that may be available to you, and formulate a plan of action. You can do this and we're here to help you every step of the way.

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

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

Caring.com

www.caring.com/local/adult-day-care

A Place for Mom

www.aplaceformom.com/respite-care

ARCH National Respite Network

www.archrespite.org/respitelocator

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2. Is caregiving causing you to feel isolated?

If yes, look for caregiver support groups in your local area or online. These can be great support networks for you to share what you are experiencing. Here are some resources to get you started:

Alzheimer's Association Support Groups

www.alz.org/apps/we_can_help/support_groups.asp

Caring.com Support Groups

www.caring.com/support-groups

Family Caregiver Alliance Support Groups

www.caregiver.org/support-groups

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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 to help you make some time for yourself?

If yes, here are some resources to help you find the help you need:

CareLinx

www.carelinx.com

Caring.com

www.caring.com

B. Does your loved one need in-home medical care?

If yes, here are some resources:

Caring.com

www.caring.com

National Association for Home Care and Hospice

www.nahc.org

Visiting Nurse Associations of America

www.vnaa.org

Medicare Home Health Compare

www.medicare.gov

C. Does your loved one need in-home medical equipment?

If yes, here is a resource:

Medicare.gov Supplier Directory

www.medicare.gov/supplierdirectory

D. Do you need caregiver training?

If yes, here are some training resources:

Alzheimer's Association Care Training Resources

www.alz.org/care/alzheimers-dementia-care-training-certification.asp

American Red Cross- Family Caregiver Training Program

www.redcross.org/take-a-class

Healios

www.myhealios.com

☐**4. Do you or your loved one need assistance with grocery shopping and/or meal delivery?**

If yes, here are some resources:

Mom's Meals

www.momsmeals.com

Magic Kitchen

www.magickitchen.com

Personal Chef To Go

www.personalcheftogo.typepad.com

Meals on Wheels

www.mealsonwheelsamerica.org

Silver Cuisine

www.silver.bistromd.com

50+ Places to Buy Groceries Online

mashable.com/2008/06/05/online-grocery-shopping/#GjPb8Ob2GkqK

☐**5. Do you or your loved one need assistance with transportation?**

If yes, here are some resources:

Caring.com Senior Transportation

www.care.com/senior-transportation

National Aging and Disability Transportation Center

www.nadtc.org

☐ **6. Do you need help in determining what daily care services could best help your loved one?**

If yes, here are some Geriatric Care Manager resources:

Aging Life Care Association

www.aginglifecare.org/ALCA

Caring.com Geriatric Care Managers

www.caring.com/local/geriatric-care-managers

National Care Planning Council

www.longtermcarelink.net/a2bfindmanager.html

National Association for Area Agencies on Aging

www.n4a.org/

☐ **7. Is your loved one aging in place at their residence or yours?**

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

To make sure, download Caring Village's FREE Home Preparedness and Maintenance Checklist at info.caringvillage.com

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

If yes, here are some resources to find housing:

A Place for Mom

www.aplaceformom.com

Caring.com

www.caring.com/local

Medicare Nursing Home Compare

www.medicare.gov/nursinghomecompare/search.html

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9. Do you need financial assistance to help cover your caregiving costs?

If yes, here are some resources:

Benefits Check Up

www.benefitscheckup.org/

Paying for Senior Care.com

www.payingforseniorcare.com/longtermcare/resources/cash-and-counseling-program.html

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10. Are you caring for a veteran?

If yes, here is a resource:

VA Caregiver Support

www.caregiver.va.gov/

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

- Accumulating your loved one's essential papers and records?
- Establishing a list of important financial information?
- Organizing contact information for financial and legal professionals?
- Creating a Financial Power of Attorney?

To ensure you have everything you need, download Caring Village's FREE Financial, Medical, Legal, and Estate Planning Caregiver Checklist at info.caringvillage.com/financial-checklist

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

- Contact information for doctors, pharmacies, and pharmacists?
- A list of their medications, past medical procedures, allergies, and blood type?
- Health insurance information
- Copies of important legal documents

To ensure you have everything you need, download Caring Village's FREE Financial, Medical, Legal, and Estate Planning Caregiver Checklist at info.caringvillage.com/financial-checklist



13. Has your loved one provided their doctors offices and other health care 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)?

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 fill out the appropriate forms.

Caregiver Tip: When you obtain written release authorizations from the health care 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.



14. Have you taken care of all 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.?

If no, here are some resources to find legal help:

Law Depot
www.lawdepot.com

Legal Zoom
www.legalzoom.com

To ensure you have everything you need, download Caring Village's FREE Financial, Medical, Legal and Estate Planning Caregiver Checklist at www.caringvillage.com/resources



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

To ensure you have everything you need, download Caring Village's FREE Financial, Medical, Legal, and Estate Planning Caregiver Checklist at info.caringvillage.com/financial-checklist

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

☐ **17. Have you researched caregiver resources in your local area?**

If no, here are good places to start:

National Association of Area Agencies on Aging
www.n4a.org

National Respite Network
archrespice.org

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

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

Sign up at www.caringvillage.com and download the Caring Village App in the App Store or Google Play.

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 (source: Investopedia).

Adult Day Care: Adult Day Care Centers allow hard-working caregivers to 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 (source: 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 (source: 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.

Caregiving Team: A caregiver's trusted informal network who helps them collectively provide care for their loved one. This can include family members, friends, neighbors, professional caregivers, etc.

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.

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 (source: 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 (source: 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 (source: 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 (source: 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 (source: 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" (source: Legal Zoom).

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 (source: Next Step in Care).

HIPAA Release Form: The HIPAA (Health Insurance Portability and Accountability Act) law requires doctors and other health care providers to get written authorization (i.e. a signed release form) from a patient before they can share most health information about him or her with a “third party” – and that includes relatives and caregivers. (source: 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 health care practitioner (source: 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 (source: 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, and 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 (source: 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 (source: 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 illnesses. 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 (source: 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 their basic quality of life. PCS includes things such as bathing, light housework, and meal preparation (source: 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 (source: AARP).

Skilled Health Care Services: Skilled Care is health care given when someone is in need of skilled nursing or therapy staff to treat, manage, observe, and evaluate their 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 (source: Medicare.gov).

This checklist was created by Caring Village in partnership with Connected Health Resources
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