



As you step into the role of a caregiver, a journey filled with challenges and rewards awaits. It's a path that requires preparation, understanding, and an open heart. Whether you're assisting a loved one through the intricacies of Medicare or managing their day-to-day needs, your role is pivotal. To support you, we've compiled a section titled "More to Know," featuring worksheets from the National Institute on Aging, tailored to guide future caregivers like yourself through the practical aspects of caregiving.

**Coordinating Caregiving Responsibilities:** Caregiving is a team effort. This worksheet helps you identify and delegate tasks among family and friends, ensuring a balanced approach to caregiving responsibilities.

**Home Safety Checklist:** Safety is paramount. Navigate through a room-by-room checklist to eliminate hazards in an older adult's living environment, promoting a secure and safe space for them.

**Questions to Ask Before Hiring a Provider:** Quality care is crucial. Gather detailed information about potential home health care or geriatric care management services to make informed decisions about the care your loved one receives.

**Questions to Consider Before Moving an Older Adult into Your Home:** Sometimes, the best care is at home. This list aids in evaluating whether integrating an older family member into your household is the right move for everyone involved.

**Managing Medications and Supplements:** Health management is key. This worksheet allows you to track all medications and supplements, facilitating clear communication with healthcare providers and fellow caregivers.

**Important Documents and Paperwork:** Organization is essential. Compile vital records and documents to ensure you have access to critical information when needed.

These tools are designed to empower you with knowledge and practical solutions, enhancing your caregiving journey. While caregiving can be complex, especially when navigating healthcare options like Medicare, remember, you're not alone. With these resources, you're taking a step towards becoming a more effective, informed, and compassionate caregiver.

# Worksheet: Coordinating Caregiving Responsibilities



Caregiving comes with many responsibilities, from helping with housework to driving an older person to doctor’s appointments. It can be helpful to divide up the caregiving duties among family and friends. You can use this checklist to help you coordinate. It is arranged by type of task, such as “health and medical care.” Add other activities as needed and note who is taking care of each one in the “Caregiver” column.

Type of task	Related activities	Caregiver
<b>Household needs</b>	Do laundry and other housework	
	Prepare meals, with awareness of any special diets or dietary restrictions	
	Shop for food and other necessities	
	Assist with home maintenance, such as making repairs and doing yardwork	
	Provide transportation, such as car rides to appointments	
<b>Self-care, supervision, and mobility</b>	Assist with personal care, such as bathing, dressing, eating, and using the toilet	
	Help with getting in and out of beds and chairs	
	Getting around inside or outside the home	

Type of task	Related activities	Caregiver
<b>Emotional and social support</b>	Provide companionship and someone to talk to	
	Encourage the person to participate in hobbies and other leisure activities	
	Help the person manage their feelings	
	Troubleshoot problems that come up	
	Provide respite care to a primary caregiver	
<b>Health and medical care</b>	Encourage a healthy lifestyle and self-care	
	Keep track of medicines and make sure they are taken at the right time	
	Manage other medical care at home, such as wound care or giving shots	
	Respond to acute needs and emergencies	
<b>Coordinating care</b>	Find out information and keep other caregivers up to date on changing conditions	
	Manage a shared notebook and calendar to coordinate care among family members and friends	
	Communicate with doctors, nurses, pharmacists, and other health care providers	

Type of task	Related activities	Caregiver
<b>Coordinating care (continued)</b>	Locate, arrange, and supervise nurses, social workers, home care aides, and other service providers	
	Coordinate medical appointments	
	Participate in treatment decisions	
	Order and pick up prescription medicines	
<b>Financial and legal</b>	Handle financial matters, such as paying bills and managing budgets	
	Manage legal matters, including official records such as wills and insurance policies	
	Participate in advanced care planning	
<b>Other tasks</b>		

# Worksheet: Home Safety Checklist



The following room-by-room checklist can alert you to potential hazards in an older person's home. Use it to identify any changes or repairs needed to help keep them safe. Keep in mind that it may not be necessary to make all of the suggested changes. It is important, however, to reevaluate home safety every so often as the person's behavior and needs change.

## Throughout the home

- Are any repairs needed?
- Is the house well lit, inside and out, particularly at the top and bottom of stairs? Do any lightbulbs need to be replaced?
- Are emergency phone numbers (ambulance, Poison Control, doctors, hospital, etc.) and the person's home address near all telephones?
- Is there clutter, which can cause disorientation and confusion and increase the risk of falling?
- Is mail, recycling, or trash piling up? Do there need to be more trash and recycling containers around the house?
- Is each bottle of prescription medicine clearly labeled with the person's name, name of the drug, drug strength, dosage frequency, and expiration date?
- If there are guns in the home, are they locked up and unloaded, with ammunition stored separately?

## Floors

- Are there any tripping hazards at exterior entrances or inside the house (throw rugs, for example)?
- Are there non-slip strips or mats on tile and wood floors or surfaces that may get wet? Are carpets fixed firmly to the floor?
- Are all walking areas free of furniture and extension and electrical cords?
- Have smoke and carbon monoxide alarms been installed near the kitchen and in all bedrooms? Have the batteries been checked recently?

## Stairs

- Are the stairs manageable, or is a ramp or gate needed?
- Could handrails be installed on both sides of the staircase?

Is there at least one stairway handrail that extends beyond the first and last steps on each flight of stairs?

Are any outdoor steps sturdy and textured to prevent falls in wet or icy weather? Mark the edges of steps with bright or reflective tape.

## Bathrooms

Are there grab bars near toilets and in the tub or shower?

Have nonskid adhesive strips, decals, or mats been placed in the tub and shower? If the bathroom is uncarpeted, consider placing these strips next to the tub, toilet, and sink as well.

Have a plastic shower stool and a hand-held shower head been installed to make bathing easier?

Is the water heater set at 120° F to avoid scalding tap water?

Is there a night light to make overnight trips to the bathroom safer?

## Kitchen

Are there safety knobs and an automatic shut-off switch on the stove?

Is there enough food in the fridge? Is any of it spoiled? Are there staple foods (such as cereal, sugar, canned soup) in the cabinets?

Has a drain trap been installed in the kitchen sink to catch anything that may otherwise become lost or clog the plumbing?

## Outdoors

Are there secure locks on all outside doors and windows?

If a walker or wheelchair is needed, can the entrances to the house be modified – perhaps by putting in a ramp to the front door?

Is there a small bench or table by the entry door to hold bags and packages while unlocking the door?

Is outside lighting adequate? Light sensors that turn on lights automatically as you approach the house may be useful.

Have bushes and foliage been pruned away from walkways and doorways?

If there is a swimming pool, is it safe? Restrict access to a swimming pool by fencing it with a locked gate, covering it, and closely supervising it when in use.

Have you addressed any uneven surfaces or walkways, hoses, and other objects that may cause a person to trip?



# Worksheet: Questions To Ask Before Hiring a Care Provider



Before signing an agreement for home health care or geriatric care management, get as much information as you can about the services, fees, terms, and restrictions. You can use this worksheet to help you collect information about each service you're considering.

**Name of service provider:** \_\_\_\_\_

**Contact person:** \_\_\_\_\_ **Date:** \_\_\_\_\_

<b>1</b>	<b>Is your service licensed and accredited by the state or local government and/or a professional association?</b>	
<b>2</b>	<b>How long have you been providing care management services?</b>	
<b>3</b>	<b>What are your fees? Will you provide information on fees in writing prior to starting services?</b>	
<b>4</b>	<b>What is included and not included in your services?</b>	
<b>5</b>	<b>How many days per week and hours per day will a care provider come to my home?</b>	
<b>6</b>	<b>Is there a minimum number of hours required?</b>	

7	Will it be the same provider each time?	
8	How do you check the background and experience of your care providers? Can you provide references?	
9	How do you train your care providers?	
10	Are you available for emergencies around the clock? What types of emergency care can you provide?	
11	How will you communicate information to me?	
12	Who do I contact if there is a problem?	
13	If I wish to discontinue services, how much notice do you require?	
14	Other questions to ask:	

**Notes**



# Worksheet: Questions To Consider Before Moving an Older Adult Into Your Home



In some cases, it makes sense for an older parent, relative, or friend to move into your home so you can take care of them. If you're considering whether that's the right arrangement for you, here are some questions to think about:

Is there space in your home? Is the home safe and accessible for an older person?

How does the older person feel about moving into your home? How do you and others in the household feel about it? Do you get along well?

Is someone around to help the older person during the day? Is transportation available?

What is the older adult able to do for themselves? What do they need help with?

What personal care are you willing and able to provide – for example, moving the person from a chair to a bed or toilet, giving medications, changing incontinence pads, or bathing?

Are there other family members, friends, or neighbors nearby who can help care for the older person?

What services for older adults are available in your community? Can you afford to hire professional services to assist with caregiving?

What kind of specialized medical care is available nearby? Will the person have to switch doctors or other health care providers?

What other living options are available? Have you considered all the alternatives?





# Worksheet: Important Documents and Paperwork



It can be helpful to store an older person's official records and legal documents together in one place so you can access them quickly when you need them. Keep these materials somewhere safe and easy to find, like a fireproof lock box. This checklist can help you figure out what information to assemble.

## Personal Records

- Personal information**, such as their Social Security number, date and place of birth, and education and military records.
- Identity documents** including Social Security card, passport, name change documentation, and a copy of their driver's license or other ID card.
- Vital records** such as birth and death certificates, and certificates of marriage, divorce, citizenship, or adoption.
- Contact information** for children, neighbors, other close family and friends, lawyers, financial advisors, and religious contacts.
- Legal documents** including advance directives, powers of attorney, trusts, and the most up-to-date will with the person's original signature.
- Health information**, such as a list of diagnoses and medications, and contact information for health care providers.
- Usernames and passwords** for online banking, bill paying, and other critical services.

## Financial Records

- Banking information**, including the name of their bank(s) and account numbers for checking, saving, money market, and other accounts. Location of safe deposit box and key.
- Assets and income**, such as pensions from their employer, Social Security, IRAs, 401(k)s, and other investment income. Include the name and contact information for any financial professionals.

**Debts and other liabilities** including loans, lines of credit, and mortgages.

**Credit and debit card** companies, authorized users, account numbers, and balances.

**Insurance information** such as Medicare, Medicaid, private health insurance, long-term care insurance, and life insurance. Include policy numbers and the name and contact information of insurance agents.

**Homeowner information** including property taxes, homeowner's insurance policies, warranties or service plans, and the original deed of trust for the home.

**Car paperwork**, including car title and registration, details of any car loans, and auto insurance policies.

**Recent income tax returns** and related documentation.

