

Getting Started – The Caregivers Checklist

Getting Started	Answer / Discussion	Suggestions
What are your loved one's wishes and preferences?		<ul style="list-style-type: none"> ▪ Meet with you loved one to discuss his or her current health situation and any prognosis. Identify how you will work together.
Do you know where all important documents and passwords are kept including bank accounts, retirement accounts, safe deposit boxes, investments, wills and trusts?		<ul style="list-style-type: none"> ▪ Discuss the need for knowing the location of all records with your loved one. ▪ Collect all files and documents you think you will need. ▪ Complete a Personal Information and Record Inventory. ▪ Obtain access to your loved one's safe deposit box or at least learn how you might get access if necessary.
Who else can help with caring for your loved one?		<ul style="list-style-type: none"> ▪ Make a list of all the tasks with which you need help and then make a list of all the people who can help you (relatives, neighbors, friends, community resources). Ask for help. ▪ Look into local caregiver resources that can provide respite care either in the home or at an adult day care facility. ▪ Look into home-delivered meal program such as Meals on Wheels.
What will you do to take care of yourself?		<ul style="list-style-type: none"> ▪ Identify how you will find time for yourself each day to do something you enjoy. ▪ Assess your own level of stress. ▪ Join a support group. ▪ Take care of your own health: eat well, get enough sleep, and exercise.

Type of Care Needed	Answer / Discussion	Suggestions
<p>What kind of care does your loved one need now and how might that change in the future?</p>		<ul style="list-style-type: none"> ▪ Review different types of care. ▪ Talk with your loved one about his or her preferences for housing (e.g., wants to stay at home). ▪ Complete Assessing Your Loved One’s Needs checklist. ▪ Consider hiring a Geriatric Care Manager to perform a formal assessment.
<p>Could your loved one remain at home if he or she had some professional help (Example: skilled nurse, home health aide)?</p>		<ul style="list-style-type: none"> ▪ Research the types of professional services available in the home. ▪ Search local resources to find out which providers are available in your area. ▪ Perform a Home Safety and Security Checklist to identify home improvements.
<p>Would your loved one do well in an assisted living community?</p>		<ul style="list-style-type: none"> ▪ Research more about what features assisted living facilities provide. ▪ Visit a few assisted living facilities.
<p>Will he or she likely need a skilled nursing facility or nursing home in the future?</p>		<ul style="list-style-type: none"> ▪ Gather more information from his/her doctors. ▪ Research and visit a few skilled nursing homes.
<p>Has your loved one been diagnosed with a mental or health condition that might require specialized care?</p>		<ul style="list-style-type: none"> ▪ Gather more information from his/her doctors. ▪ Research facilities that provide specialized care related to the diagnosis.

Costs and Insurance	Answer / Discussion	Suggestions
How much will it cost to provide care?		<ul style="list-style-type: none"> ▪ Call providers of care to obtain estimates. ▪ Estimate costs based upon expected length of stay and per day costs provided by facilities or professionals.
What do Medicare and Medicaid cover and is your loved one eligible for either or both?		<ul style="list-style-type: none"> ▪ Review relative's Medicare coverage. ▪ Research Medicaid eligibility criteria for relative's state.
What private health insurance does your loved one have?		<ul style="list-style-type: none"> ▪ Locate relative's policy documentation or ID card. ▪ Locate or order the relative's evidence of coverage from his or her health insurance carrier. Review coverage information.
Does your loved one have a long term care insurance policy? Does he/she need it?		<ul style="list-style-type: none"> ▪ Locate relative's policy documentation. ▪ Educate yourself about long-term care insurance and obtain estimates for coverage for your loved one.

Legal	Answer / Discussion	Suggestions
Does your loved one have any advanced directives in place?		<ul style="list-style-type: none"> ▪ Locate your loved one's important documents. ▪ Research advanced directives and discuss options with your loved one.
Does your loved one have any power of attorney?		<ul style="list-style-type: none"> ▪ Locate your loved one's important documents. ▪ Learn about power of attorney and the procedures. ▪ Get advice from an estate attorney. ▪ Discuss options with your loved one.
Does your loved one have a will? If not, how can I help create a legally binding will?		<ul style="list-style-type: none"> ▪ Locate your loved one's important documents. ▪ Learn about wills and the procedures. ▪ Get advice from an estate attorney. ▪ Discuss options with your loved one.
Is your loved one capable of making his/her own decisions anymore?		<ul style="list-style-type: none"> ▪ Get advice from an eldercare attorney or family attorney. ▪ Discuss options with your loved one and other family members.
Has your loved one communicated any final wishes for after his/her death?		<ul style="list-style-type: none"> ▪ Locate your loved one's important documents. ▪ Learn more about funeral and memorial service options ▪ Also cemeteries and cremation. ▪ Discuss options with your loved one.