

"There are only four kinds of people in the world –

those who have been caregivers,
those who are currently caregivers,
those who will be caregivers,
and those who will need caregivers."

Rosalynn Carter

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Introduction

This guide is for anyone who provides care for family members or friends who need help with daily living. It focuses on the needs of older adults who require care because of a serious health condition or disability, but it could also apply to other situations in which caregiving is needed. Included are tips to help you as a caregiver and ways to get support, as well as guidance on how to take care of yourself. The worksheets at the end of this guide provide questions to help coordinate care and checklists to keep track of your caregiving responsibilities and needs. Additionally, each chapter includes caregiving resources that can provide further information and support.

What is a caregiver?

A **caregiver** is someone who helps another person with everyday activities, medicines, appointments, or other tasks. An **informal caregiver** is usually a family member, friend, or neighbor. These people are generally not paid for their help. This guide is meant for informal caregivers.

A **formal caregiver** (for example, a nurse or health aide) is paid for their services. They may provide care in a person's home or in



another setting, such as an adult day care center, residential facility, or long-term care facility.

Some people use the term **care partner** rather than caregiver to show that caregiving is a two-way street involving both the caregiver and the person needing care. However, a partnership may not be possible if a loved one needs significant help or cannot care for themselves. In this guide, we use the term caregiver, but the information also applies to care partners.

You may also see the term **care team**, which refers to all the people who are providing care to a person. The team may include family, friends, volunteers, health care providers, formal caregivers, and others.

Caregiving can take many forms. The kinds of activities that a caregiver may assist with include:

- Household tasks, such as shopping, laundry, and cleaning
- Personal care, such as dressing, bathing, grooming, using the toilet, and brushing teeth
- Getting in and out of beds and chairs or walking
- Taking and keeping track of medicine
- Medical care, for example, keeping wounds clean or giving shots

- Preparing food, feeding, and monitoring dietary restrictions
- Transportation, such as car rides to appointments
- Health care, including talking to doctors, making medical decisions, researching care services, and coordinating doctor visits
- Money and finances, such as handling bills and budgets
- Legal matters, including managing official documents such as wills and insurance policies

Caregiving By the Numbers

About **1 in 4**
Americans are caregivers.



Most caregivers also have other jobs and responsibilities yet spend an average of **24 hours** each week caring for a loved one.



1 in 6 adults who are not currently caregivers expect to provide care in the future to a friend or family member.



Grandfamilies and Kinship Families



Most of the information in this guide is designed for people who are taking care of older relatives and friends. However, many grandparents and older adults are caregivers for grandchildren and other young relatives. These child care arrangements are often called grandfamilies (in the case of grandparents and grandchildren) or, more generally, kinship families.

These resources can provide information and support for grandfamilies and kinship families:

The Child Welfare Information Gateway

This service of the Administration for Children and Families offers information, resources, and tools for kinship caregivers, including grandparents.

800-394-3366

info@childwelfare.gov | www.childwelfare.gov/topics/outofhome/kinship

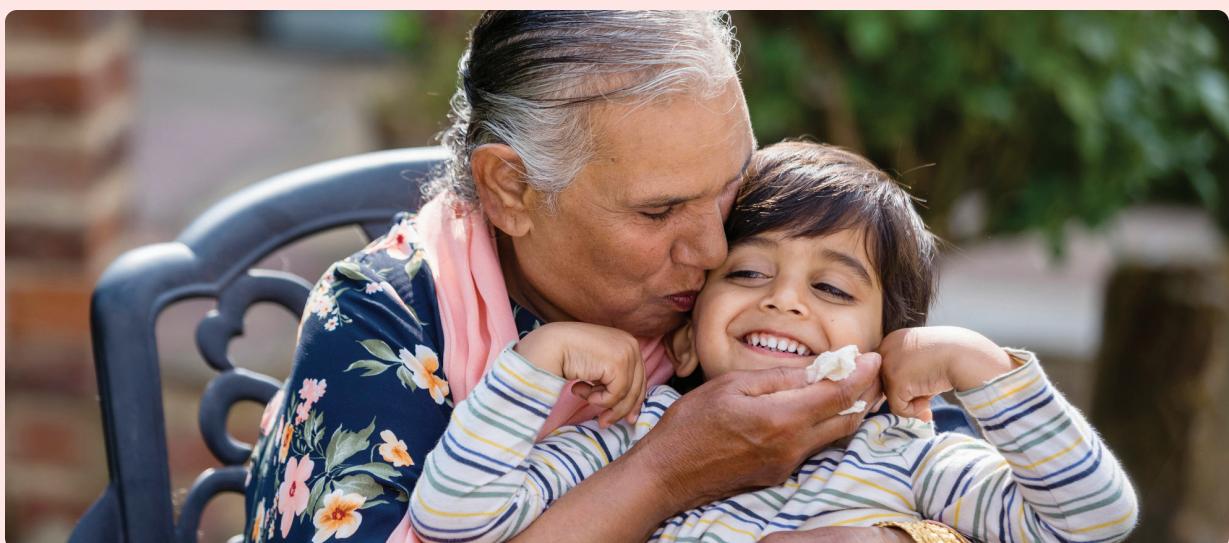
The National Family Caregiver Support Program

This program from the Administration for Community Living provides information and assistance via state governments to family caregivers, including older relatives (not parents) age 55 and providing care to children under the age of 18.

202-401-4634

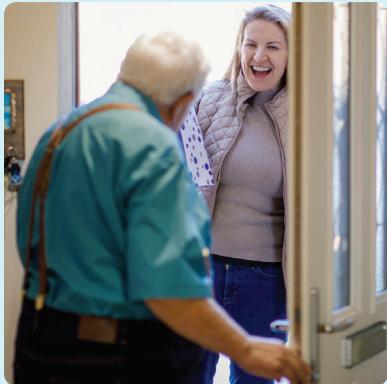
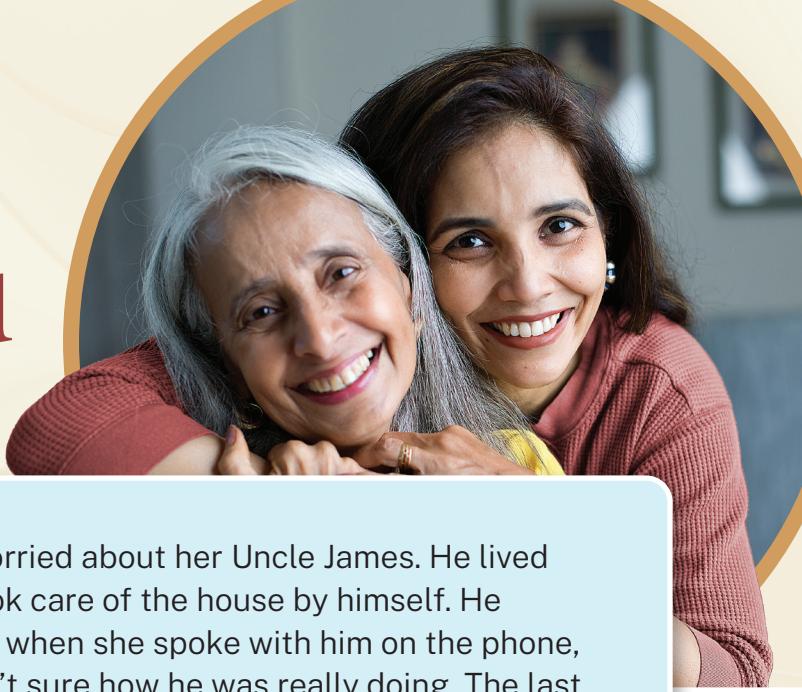
<https://acl.gov/programs/support-caregivers/national-family-caregiver-support-program>

Additional resources for caregivers are listed at the end of this guide.



Chapter 1:

Getting Started



Alicia was worried about her Uncle James. He lived alone and took care of the house by himself. He sounded fine when she spoke with him on the phone, but she wasn't sure how he was really doing. The last time she stopped by for a visit, she noticed dishes piled up in the sink and clothes scattered on the floor in his bedroom. Because he was usually very neat and tidy, Alicia was concerned that he might need more support and wondered how she could help.

After exploring resources through a local senior center, Alicia planned another visit to look for trouble spots and, with permission, to talk with one of her uncle's neighbors. Once she knew more about the situation, she was able to have an open conversation with her uncle about what types of support would be most useful. Although she didn't live nearby, she was able to coordinate an aide to come by regularly to help her uncle manage his home.

If you have never been a caregiver before, it may feel daunting at first. There might be tasks to organize, new medical terms to learn, and schedules to coordinate. If you live far away, you may need to find new ways to stay in touch. This chapter will help you figure out where to start as a caregiver and how to coordinate with family and friends to share responsibilities.

"Caregiving can be overwhelming, especially at the beginning. Try to tackle one task at a time."

How can I tell whether a family member or friend needs help?

It is not always clear whether someone needs help. Sometimes a person will recognize that they need help and request it, or an emergency or sudden illness will make it clear that assistance is needed. But there are often other signs that indicate someone may need extra support.

A phone call, email, or text message is not always the best way to tell whether an older adult needs help handling daily activities.

their skills and interests. When thinking about everyone's strengths, consider what each person is particularly good at and how those skills might help in the current situation:

- Who is best at finding information and keeping people up to date on changing conditions?
- Who is most comfortable using email, text messages, and other forms of technology?
- Who do people call when they need emotional support and someone to talk to?
- Who is most confident about speaking with medical staff and conveying information to others?
- Who lives close enough to assist with day-to-day tasks, such as grocery shopping, cooking, and cleaning?
- Who likes coordinating larger tasks, such as helping to organize a move?
- Who is good with numbers? Could they take charge of tasks such as paying bills, keeping track of bank statements, and reviewing insurance policies and reimbursement reports?

- Other than the primary caregiver, who can step in to help occasionally? For example, can someone else stay with the person needing care so the primary caregiver can take a short break or go on vacation?

Be honest about your limits. No one can be expected to do everything. Be gentle with yourself and realistic about how much you can do and what you are willing to do. For example, you might ask yourself:

- How will my decision to take on caregiving responsibilities affect my work and home life?
- If I don't live nearby, how often, both mentally and financially, can I afford to travel?
- Am I emotionally prepared to take on what may feel like a reversal of roles between me and the older person — such as taking care of my parent instead of my parent taking care of me? Can I continue to respect their independence?
- Can I be calm and assertive when communicating with the older person and any other caregivers? Could I seek advice or training to get better at this?

Stay in the Know With a Caregiving Notebook

To keep everyone involved in caregiving informed, it may be useful to compile a notebook with details about the person's medical care, social services, contact numbers, financial information, and other pertinent details. This list can be created and updated electronically or in a paper notebook that's kept in a central location. There are also smartphone apps that enable you to divide up caregiving duties, keep an appointment calendar, and share updates with others. Whichever format you choose, make sure everyone has access to the caregiving notebook and that it is reviewed regularly and updated as needed.



Chapter 2:

Finding the Care You Need at Home



Marlon's 80-year-old mother moved in with him about a year ago so he could care for her. He loves her and is happy to help, but lately she needs more assistance around the house. Sometimes Marlon feels exhausted and overwhelmed, and he feels guilty that she is alone while he's at work. A friend suggests that Marlon consider having a professional come in to help.

Marlon isn't sure where to start, so he searches online for services in their area. He finds a professional service that can help his mother with meals, housekeeping, and personal care. After reading reviews and checking references, he hires an aide from the service to be with his mother for a few hours each morning. Marlon's mom is now getting the help she needs, and Marlon doesn't worry as much when he's at work.

Long-term care services help people live as independently and safely as possible when they can no longer perform everyday activities on their own. This care is provided in different places by different caregivers, depending on a person's needs. In many cases, long-term care is provided at home by informal caregivers, such as family members, friends, and neighbors. It can also be supplemented by formal caregivers, including in-home and community services. This chapter offers

suggestions and resources for long-term care to support an older adult who wishes to continue living in their home.

How do I know if an older adult can continue living at home safely?

Many people want the same things as they get older: to stay in their own homes, to maintain independence for as long as possible, and to turn to family and friends

Chapter 3:

Choosing a Long-Term Care Facility



June lived in Phoenix with her children, while her father, Zhuang, lived alone in Los Angeles. She visited him several times each year. When she noticed that her dad was starting to have problems managing on his own, they sat down together to talk about their options. June's job and family needed her in Phoenix, while Zhuang's friends, doctors, and religious community were all in Los Angeles. June brought up the possibility of moving him to an assisted living facility close to his current home. There, Zhuang

could get help when he needed it but still have the freedom to see his friends and go to the grocery store and to church.

June interviewed several facilities, and she and her dad toured one that seemed like a good fit. Zhuang said he could see himself living there. Within a month, they signed a contract. After Zhuang moved into assisted living, it took some time to adjust. He missed his old neighborhood and his former home. But he found that the facility had a weekly movie night, which he enjoyed, and computers he could use to email June and his grandchildren. Assisted living seemed like a good choice, and June was glad that he was getting the care he needed.

Sometimes an older person can no longer live safely or comfortably in their own home. They may be able to move in with family or friends. Some people, however, need more help than a family member or friend can provide. They might move to a residential (live-in) facility, such

as a board and care home, an assisted living facility, a nursing home, or a continuing care retirement community.

"The goal is to come up with a plan that works for everyone, especially the older person."



How can I help an older adult decide if it's time to move from their home?

The decision about whether and when an older adult should move from their home is often difficult and emotional. Everyone will have their own reasons for wanting (or not wanting) to take such a step. One person may decide a move is right because they can't or don't want to manage the home any longer. For another person, the need for regular, hands-on care motivates a change.

Making a decision that is best for the older person and their caregivers can be difficult. Try to learn as much as you can about the available housing options. These may include:

- Moving to a smaller home, such as from a single-family home to a condominium or apartment
- Moving in with a family member or friend
- Moving to a residential facility, such as an assisted living facility or a nursing home

The choices for where to live might be limited by factors such as illness, ability to perform activities of daily living (for example, eating, bathing, dressing, and using the toilet), and personal preferences. Money is often part of this decision as well. In some cases, a move frees up cash so that the older adult can afford a more suitable situation. For others, the desire to move to a safer location is hampered by a lack of funds to cover the cost of the new home.

Some families and caregivers find that a meeting or conference call is a good way to talk through the pros and cons of each option. The goal is to come up with a plan that works for everyone, especially the older person.

To a long-distance caregiver, a move may provide a solution to the problem of not being close enough to help regularly. For some caregivers, moving an older person who needs help to their own home or community is an option. Others decide to have a family member move back to the older person's local area to become the primary caregiver. *Worksheet: Questions To Consider Before Moving an Older Adult Into Your Home*, on page 63 of this guide, lists some questions to think about when considering this kind of move.

Keep in mind that leaving a home, community, and familiar medical team can be disruptive and difficult, especially if the older person is not enthusiastic about the change. You might first want to explore what services are available in the person's community to assist them in their home, including home health care, housekeeping, personal care, and transportation services. If a move becomes necessary, look for resources to help the person handle the transition. These may include counseling and support, guidance from health care professionals, and suggestions from your local senior center or Area Agency on Aging.

What types of long-term care facilities are available?

Some facilities offer only housing and housekeeping, but many also provide personal care, social and recreational activities, meals, and medical services. Some facilities offer special programs for people with Alzheimer's disease and other types of dementia. Information about how to find and choose a facility is available on page 23.

or a neighbor can stop by unannounced to see how things are going. Stay in touch with the older adult by phone and take note of any comments or mood changes that might indicate neglect or mistreatment.

What are some signs of abuse?

Abuse of older adults can be physical, emotional, sexual, or psychological. Mistreatment can also take the form of neglect, abandonment, or financial exploitation. An older person might be a victim of abuse if they:

- Become withdrawn or act agitated or violent
- Display signs of trauma such as rocking back and forth

- Have unexplained pressure marks, bruises, burns, cuts, or scars
- Develop preventable conditions such as bedsores (open sores that can develop when a person stays in one position for a long time, such as being confined to a bed)
- Have hazardous, unsafe, or unclean living conditions
- Look messy, with unwashed hair or dirty clothes
- Lack personal health care items such as glasses, a walker, dentures, or hearing aid
- Have sudden and unexpected financial losses or unpaid bills despite adequate financial resources

Watch for a pattern that might indicate a problem and seek help if you are concerned.

Where To Get Help



If you suspect an older person is being abused, report what you see to an authority. Many older adults are too ashamed to report mistreatment. Or they're afraid if they make a report, it will get back to the abuser and make the situation worse. Therefore, family and friends must step in to resolve any problems.

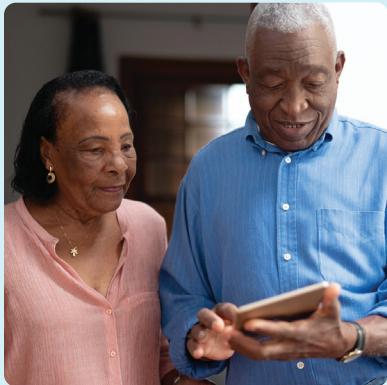
Some types of mistreatment may be criminal. You do not personally need to prove that abuse is occurring; professionals will investigate. These resources can help:

- **Adult Protective Services programs** help protect vulnerable adults from abuse, neglect, and exploitation. Phone numbers for these programs in each state are available at www.napsa-now.org/aps-program-list or by calling **202-370-6292**.
- **The National Center on Elder Abuse** provides guidance on how to report abuse, where to get help, and state laws that deal with abuse and neglect. Visit <https://ncea.acl.gov> or call **855-500-3537** for more information.
- **Long-term care ombudsmen** advocate for the needs of people who live in assisted living facilities, board and care homes, and nursing homes. They are trained to help resolve problems. To find a long-term care ombudsman in your state, visit https://theconsumervoice.org/get_help or call **202-332-2275**.

If you think someone is in urgent danger, call 911.

Chapter 4:

Covering the Costs of Caregiving



Jim and Sally retired a few years ago. They recently decided they wanted to move into a continuing care retirement community closer to their kids. They had resources, including retirement income, money from selling their home, and long-term care insurance policies. But they weren't sure which resources they should use to pay the costs of moving into their new apartment. They called their financial professional, who discussed the pros and cons of tapping into their different funding sources, including how it might

affect their taxes. They also wanted to make sure there would still be money to leave their adult children as an inheritance. After talking through the options, Jim and Sally felt more confident about coming up with a plan for their next steps.

Many caregivers and older adults worry about the costs of long-term care. These expenses can use up a significant part of monthly income, even for people who thought they had saved enough. How people pay for long-term care depends on their financial situation and the kinds of services they use.

Some people believe that their current health or disability insurance will pay for their long-term care needs, but most of these insurance policies include limited, if any, long-term care benefits. In most cases,

people must find other means of paying for long-term care. They may rely on a variety of payment sources, including personal funds, federal and state government programs, and private financing options. Read on to find out more about each of these options.

How can personal funds be used to cover out-of-pocket expenses?

Many older adults pay for part or all of long-term care with their own money. They may



Chapter 5:

Coordinating Medical Care



Jesse's grandfather was diagnosed with dementia last year. When he could no longer manage his own health care, Jesse stepped in to help. After his diagnosis, Jesse's grandfather started seeing several new health care providers and was given many new medications. There was a lot to keep track of. Jesse made sure he took his medications every day and scheduled his doctor's appointments. But she was having trouble keeping up with the whirlwind of new information, prescriptions, and specialists.

Jesse shared her concerns with a friend who worked as a nurse. Her friend recommended smartphone apps that could help her keep her grandfather's medications straight and set reminders to take them. Jesse also found out how to access his electronic health records online and make telehealth appointments with some of his doctors. Using these tools, Jesse felt that she had a better handle on managing her grandfather's care.

If you are a caregiver for an older adult, you may be juggling many different aspects of their care. You might need to go with them to doctor's appointments, look up information about an illness online, or help manage their medications. This chapter provides suggestions and resources that can help.

"Working with health care professionals can be an important part of being a caregiver."

How can I talk with an older adult's health care providers?

Many older adults find it helpful to bring a family member or friend with them to the doctor's office. And working with health care professionals can be an important part of being a caregiver.

First, you will need to make sure that the person's health care providers have permission to speak with you. There are federal and state laws that protect a person's

Chapter 6:

Planning Ahead



Nadia wanted to help her parents make plans for their future medical care, but she wasn't sure how to start the conversation with them. What care would they want if they couldn't make decisions for themselves? Who would make those decisions? Did they have a living will?

One weekend, Nadia sat down with her parents. She said, "Mom and Dad, I remember how hard it was for Tia Rosa's family when she got so sick. The doctors

asked them whether she would have wanted more treatment, but no one was sure of her wishes. I don't want that to happen to us." It was an emotional conversation, but it helped Nadia understand what her parents would want if they were in a similar situation. Nadia was relieved that they had opened the door to planning for her parents' future care.

If you are caring for an older adult, one way you can support them is to help get their health, legal, and financial affairs in order. (And yours too, while you're at it!) You want to plan for the future as well as you can, preferably with their help while they can still make decisions. Work together to make sure their legal and financial paperwork is complete and reflects their wishes. You can also discuss what future health care they would want, including palliative care and hospice care, should they need it. For more information about advance care planning, visit <https://order.nia.nih.gov>

to order or download more materials on this topic.

How can I talk with an older adult about their wishes for future medical care?

For most of us, it's hard to start a conversation about the kind of care a person would want if they became seriously ill or unable to make decisions on their own. The possibility of someone becoming ill or dying can be uncomfortable to talk about. It

can be especially difficult when the person is a parent or someone else close to you. Yet it's important to be prepared, especially in case of unexpected illness or a medical emergency. For some families, these honest conversations can also bring people closer together.

Ideally, you'll want to have this conversation face-to-face with the older adult. For most people, this subject is too sensitive for a text, email, or phone call. But different approaches will work best for different families. Once you can sit down with the older adult, here are a few ways you might start the conversation:

- Ask directly whether they have considered what kind of medical care they would want if they could no longer make decisions for themselves.
- Mention that you've been thinking about plans and wishes for your own future care.
- Bring up a friend's or neighbor's recent illness and how their family helped with future planning.
- Ask if the person has talked with their doctor already about their preferences.
- Discuss a recent TV show, newspaper article, or movie on the subject.
Have a conversation about who would like to have the family's antique dishes, for example, if you're looking for a less direct way to start.

When talking about plans for future medical care, assure the older adult that as long as they are able, they will be the one to make decisions. But by discussing their wishes now, you can make decisions in line with what they would want if it ever becomes necessary. Discussing these matters early may also help avoid some of the conflicts that can occur when

family members disagree over treatment decisions. Making their wishes known increases the chances that an older adult will receive the care they want.

Talking about an older adult's wishes for future medical care will probably take more than one conversation. Once you've started the discussion, it usually gets easier. If you need help navigating this kind of talk, the person's doctor, a mental health professional, a religious leader, or a close friend may be able to offer suggestions and support. You can also contact the Conversation Project at <https://theconversationproject.org> or by calling **866-787-0831** for a free guide to starting the conversation.

What is an advance directive and how can I help an older person set one up?

Planning for future medical care is often done through an advance directive, a formal document that includes written instructions and preferences for a person's future care. An advance directive goes into effect if the person can't communicate their own wishes. The goal is to ensure that the family and doctors understand the person's values, goals, and preferences, and could make decisions that reflect what they would want.

There are typically three main types of advance directives that can be used separately or in combination to indicate a person's wishes for their care:

A durable power of attorney for health care identifies someone — called a health care proxy or health care agent — to make decisions for a person if they are unable

Finding Legal Help



If an older adult is considering a legal arrangement such as a power of attorney, a joint bank account, a trust, or an advance directive, they may want to talk with a lawyer first. A lawyer may not be required to set up these arrangements, but they can provide guidance and advice if you need it.

You can find a directory of lawyers on the internet or at your public library, or you can contact your local bar association for the names of lawyers in your area. Be sure to ask about the lawyer's fees before you make an appointment. Your local bar association or state legal aid office can help you find out what free or low-cost options your state has to offer. Visit www.usa.gov/legal-aid for additional resources.

How can I help an older adult plan for the end of life?

When thinking about the end of life, there are many issues to consider and decisions to make. The end of life will look different depending on a person's preferences, needs, and choices. Some people may want to be at home when they die, while others may prefer to seek treatment in a hospital or facility until the very end. Palliative care, which can be used along with other medical treatments throughout the course of an illness, or hospice care, which is available in the final months of life, may also be options. These types of care focus on a person's comfort and quality of life and support for the family and caregivers.

One of the best things you can do as a caregiver is to discuss end-of-life care with the older person in advance. Make sure their wishes are known to any other caregivers, family, or friends who might make decisions on their behalf. Also encourage the older person to discuss

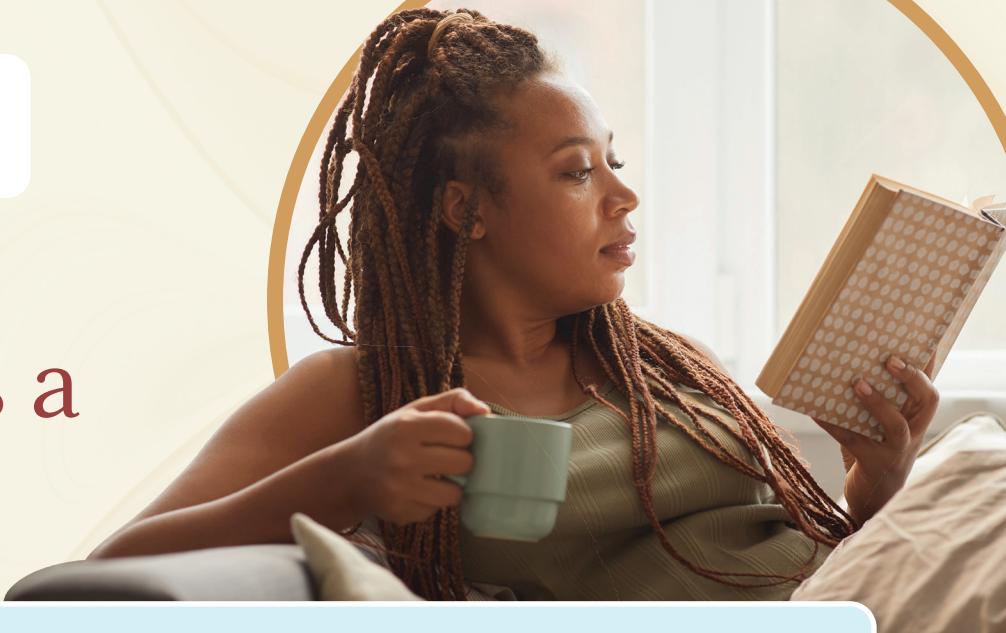
their end-of-life preferences with their doctor. The doctor can explain which health decisions the older adult may need to make in the future and the treatment options available. Discussing advance care planning decisions with a doctor is covered by Medicare during an annual wellness visit and at other times as needed. Private health insurance may also cover these discussions.

To make their wishes clear, the person may need to state their preferences in a living will and have doctor's orders (special forms that the person completes with their doctor). Doctor's orders in a person's medical chart make it much more likely that their wishes will be carried out, even in emergency situations. Here are examples of doctor's orders:

Do not resuscitate (DNR) order tells health care staff not to try to return the heart to a normal rhythm or attempt other life-support procedures in case the heart or breathing stops.

Chapter 7:

Caring for Yourself as a Caregiver



Caring for teenagers and two sets of older parents felt like a full-time job to Lee and Andy — and that was on top of their full-time careers. They loved their family but felt a little overwhelmed by all the sports practices, doctor's appointments, and trips to the grocery store. Taking care of themselves was the last thing on their minds. But when they realized that they hadn't had a day off in more than a year, they knew that they needed to take a break. Lee and Andy found people to help them so they could go away for a long weekend. When they returned, they set up regular assistance with volunteers who could visit their parents weekly, a carpool for sports games, and a grocery delivery service. Creating some breathing room in their schedules helped them be better caregivers to the people who needed them.

Caregiving is not easy — not for the caregiver and not for the person receiving care. It comes with sacrifices and adjustments for everyone. Taking care of an older adult can be demanding, difficult, and stressful. Often, family caregivers must juggle work and family life to make time for these new responsibilities.

Caring for an older adult can also be rewarding. Many people find that caregiving

provides a sense of fulfillment and that they like feeling useful and needed. Caregivers who reach out to others for support often make new friends and deepen their existing relationships. Some caregivers learn more about themselves and find more meaning in life through the experience.

Despite these benefits, the emotional and physical stress of caregiving can take its toll. The ongoing demands of taking care of someone else can strain even the most

Summary

Caregiving can be challenging and time-consuming, but it can also be very rewarding and meaningful. We hope this guide helps you and the older adult you are caring for.

Here are some main points to remember:

- Learn as much as you can about the older adult's health issues and care needs and desires so you can cope with challenges and manage their care more effectively.
- Identify people who can help with caregiving — for example, family members, friends, or neighbors — and define caregiving roles and responsibilities.
- Make sure the person's home is safe, accessible, and meets their needs. Get help, such as an in-home aide or a meal delivery service, if needed.
- If the older person can no longer live at home, explore options for long-term care. These might include assisted living, a nursing home, or a continuing care retirement community.
- Establish good communication with health care providers to help ensure the best care for the older adult.
- Find out about resources from government programs, insurance, and other sources to help cover the costs of caregiving.
- Talk with the older adult about their wishes for future medical care and help them set up advance directives.
- Organize important information so you know where it is when you need it.
- Ask for help. No one can be expected to do everything by themselves. Talk with others who are involved in caregiving to get their suggestions and support.



As the older person's needs change, so will your role as a caregiver. You can refer back to this guide for ideas and resources to help you along the way. We hope that it will help you stay organized, have productive conversations, and take good care of yourself and your loved ones.

For More Information

National Institute on Aging (NIA)

Information Center

800-222-2225 (English and Spanish)

niaic@nia.nih.gov

www.nia.nih.gov/health

The NIA Information Center offers information and publications on health and aging for families, caregivers, and health professionals.

Eldercare Locator

800-677-1116

eldercarelocator@USAging.org

<https://eldercare.acl.gov>

The Eldercare Locator is a nationwide service from the U.S. Administration on Aging and U.S. Administration for Community Living that connects older Americans and their caregivers with trustworthy local support resources.

LongTermCare.gov

800-677-1116

<https://acl.gov/ltc>

LongTermCare.gov is a resource from the U.S. Administration on Aging and U.S. Administration for Community Living. It provides basic information about long-term care, costs and insurance coverage, and help finding local services.

Medicare.gov

800-633-4227

www.medicare.gov

Medicare is health insurance for people 65 or older and those with certain disabilities and serious illnesses. Its Care Compare tool (www.medicare.gov/care-compare) can help you find Medicare-certified providers and services in your area.

Medicaid.gov

877-267-2323

www.medicaid.gov

Medicaid provides health coverage to millions of Americans, including eligible low-income adults, children, pregnant people, elderly adults, and people with disabilities. Its website provides information about eligibility, benefits, and how to find your state program.

Social Security Administration

800-772-1213

www.ssa.gov

The Social Security Administration website provides information about retirement and disability benefits, ways to sign up, benefit statements, and account access.

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
Household needs	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	
Self-care, supervision, and mobility	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
Emotional and social support	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	
Health and medical care	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	
Coordinating care	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
Coordinating care (continued)	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	
Financial and legal	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	
Other tasks		

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:** _____

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

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	

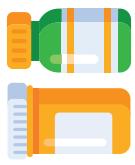
Worksheet: Questions To Consider Before Moving an Older Adult Into Your Home



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: Managing Medications and Supplements



The person you're caring for may be taking multiple prescription drugs, as well as over-the-counter medicines and dietary supplements. It can be confusing to keep track of everything! This form can help. Because medication regimens may change over time, consider making copies of this form to use in the future. Or you can download additional copies from NIA's website at www.nia.nih.gov/health/twyd-worksheets. Try to bring a current list of medications and supplements to every doctor appointment.

Name of medication or supplement	What it's for	Date started	When and how often it's taken	Dose	Color/shape	Prescribing doctor	Concerns

Name of medication or supplement	What it's for	Date started	When and how often it's taken	Dose	Color/shape	Prescribing doctor	Concerns

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.



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