

# Caregiver Checklist

Developed by the Area Agency on Aging of Pasco Pinellas, Inc.

## ***Medical***

- Referral to a physician (neurologist, psychiatrist, or geriatrician)
- Knowledgeable about Alzheimer's Disease.
- Complete diagnostic work-up.
- Discussion with the physician regarding what is happening and what to expect.
- Regular medical checkups.
- Determine the individual's current level of functioning.
- Know the patient's medical history, medications, and dosages.

## ***Care Giving***

Learn as much as you can about the disease and care giving techniques specifically helpful in coping with the disease.

- Identify/attend local support group meetings.
- Attend caregiver training (provided in Leon County by the Alzheimer's Resource Center and Alzheimer's Project of Tallahassee, Inc.).
- Develop knowledge of community resources.
- Develop care giving plans, including alternate plans for the care of the patient in the event of your illness.
- Determine what you are emotionally/physically able to do. Arrange for additional assistance through family, volunteers, respite care (home health care, adult day care or short-term respite care in a facility).
- Making the home safe for the patient is called accident-proofing. (Click [here](#) for tips!)
- Schedule regular medical care for yourself, reporting any changes in health to your physician.

## ***Legal***

- Determine if the patient needs assistance to manage his or her legal/financial affairs.
- Consult an Elder Law Attorney knowledgeable in issues such as Medicaid, Medicare, Guardianships, Estate Planning, Trusts and Advanced Directives. (The Florida Bar at 1-800-342-8060 can give you a list of Elder Law Attorneys).
- Contact attorney for advice regarding:
  - Durable Power of Attorney
  - Health Care Surrogate Power of Attorney
  - Living Will
  - Will
  - Trusts
  - Guardianship
- If documents have been prepared previously, know location and check that they are up to date with current state laws.

## ***Financial***

- Someone should assume the responsibility for:
  - Checking Account (Bill Payments)
  - Savings Account
  - Other Assets (Money Market, Stocks, Bonds, CDs)
  - Real Estate and other property (location of deeds)
  - Safety Deposit Box- - Co-signer for box access (location of box and keys)
  - Security Box or home safe (location of keys or combination)
- Review and determine the location of all insurance policies (Medical, Disability, House, Car, Long Term Care, Life Insurance, VA).
- Check for Waiver of Premium Clause on insurance policies.
- Investigate patient's eligibility for financial assistance programs.
- Determine the amount and source of all monthly income. Are any checks sent direct deposit?
- If the patient is receiving Social Security, do you want to be designated as the Representative Payee?

## ***Funeral/Burial Arrangements***

- Know previously made arrangements for cemetery lot, funeral, etc.
- Are wishes known regarding burial/cremation?
- Autopsy arrangements.

## ***Other***

- Driving (You must judge when the patient can no longer safely operate a motor vehicle.
- ID bracelet for Alzheimer's Disease patient, particularly if wandering becomes a problem.