

## Care Planning Checklist for Caregivers

Your caregiving role is dependent on the needs of the person with dementia. The following activities are for consideration only and offered as a guide. Remember, you do not need to do everything yourself!

Early stage planning	Who/When/Comments
<p><b>Education and support:</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> Contact local Alzheimer Society for information for both person with dementia and caregiver.</li> <li><input type="radio"/> Register for First Link® Learning Series.</li> <li><input type="radio"/> Register for support groups, early stage group and caregiver support group for yourself.</li> <li><input type="radio"/> Obtain list of community supports to be available as a reference.</li> <li><input type="radio"/> Engage the person with dementia in discussions when possible.</li> <li><input type="radio"/> Plan to talk or meet with other family members to share the care and keep everyone informed.</li> </ul>	
<p><b>Legal issues:</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> POA for Property signed (For the bank, you will need to show this signed copy as well as fill in the Bank POA form).</li> <li><input type="radio"/> POA for Personal Care signed.</li> <li><input type="radio"/> Legal will in place. Resource: <b><i>Getting Your Legal and Financial House in Order</i></b> <a href="http://www.champlainhealthline.ca">www.champlainhealthline.ca</a></li> <li><input type="radio"/> Advance Care Planning discussion has taken place regarding wishes Resource: <b><i>A Guide to Advance Care Planning</i></b>, Ontario Seniors' Secretariat. <a href="http://www.seniors.gov.on.ca">www.seniors.gov.on.ca</a></li> </ul>	
<p><b>Financial issues:</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> If no spouse, and bank account is in name of person with dementia, obtain permission for another person (POA) to operate account. Meet with the bank manager to have all the paperwork in order.</li> <li><input type="radio"/> If spouse living with person with dementia, establish joint account, if not in place.</li> <li><input type="radio"/> Establish a system of direct deposits for cheques and pension benefits and direct withdrawal for bill paying.</li> <li><input type="radio"/> Remove multiple credit cards or lower credit limits.</li> <li><input type="radio"/> Place person on National Do Not Call list to reduce telemarketing calls. Resources: <b><i>Managing Finances and Financial Planning Fact Sheets</i></b> <a href="http://www.alzheimerniagara.ca/resources">www.alzheimerniagara.ca/resources</a></li> </ul>	

<p><b>Getting organized:</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> Identify your support system, who you can contact for help, and link responsibilities to specific persons.</li> <li><input type="radio"/> Create a weekly/monthly schedule including activities and appointments of the person with dementia. Include your own “break times” into schedule.</li> <li><input type="radio"/> Make a list of personal contacts to call in an emergency and a list of professional contacts involved in care.</li> <li><input type="radio"/> Develop a health information record including medications and keep updated. Resource: <b>Personal Health Record</b> <a href="http://www.champlainhealthline.ca">www.champlainhealthline.ca</a></li> <li><input type="radio"/> Develop a list of household information: companies and contact information for utilities.</li> <li><input type="radio"/> Have all documentation in order and accessible including list of assets, bank account information, insurance policies, titles and deeds to property, vehicle information, and so on.</li> <li><input type="radio"/> Keep an eye on driving capabilities and safety issues in the home. Resources: <b>Planning for a day when you can no longer drive Fact Sheet</b> <a href="http://www.alzheimerniagara.ca/resources">www.alzheimerniagara.ca/resources</a></li> <li><input type="radio"/> Register for MedicAlert® Safely Home® for the person with dementia at 1-888-581-3794. <a href="http://www.medicalert.ca/safelyhome">www.medicalert.ca/safelyhome</a></li> <li><input type="radio"/> Consider living arrangements and start looking at options. Resources: <b>From Home to Retirement Home</b> <a href="http://www.rqpeo.com/media/3926/rrr_guide_sept09_3b1.pdf">www.rqpeo.com/media/3926/rrr_guide_sept09_3b1.pdf</a> <b>When a Move is Necessary Fact Sheet</b> <a href="http://www.alzheimerniagara.ca/resources">www.alzheimerniagara.ca/resources</a></li> </ul>	
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Middle stage planning	Who/When/Comments
<p><b>Education and support</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> Contact your local Alzheimer Society. Register for education sessions and caregiver support group.</li> <li><input type="radio"/> Learn strategies for coping with middle stage of dementia. Resources: Alzheimer Society publication, <b>“Day to Day Series: Communication” and Behaviours: Understanding Changes Fact Sheet</b> <a href="http://www.alzheimerniagara.ca/resources">www.alzheimerniagara.ca/resources</a></li> </ul>	
<p><b>Caregiving role</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> Plan activities for the person with dementia that are appropriate and promote satisfaction and achievement.</li> <li><input type="radio"/> Develop alternate driving/transportation plan if necessary. Resource: <b>Planning for a day when you can no longer drive Fact Sheet</b> <a href="http://www.alzheimerniagara.ca/resources">www.alzheimerniagara.ca/resources</a></li> <li><input type="radio"/> Update weekly schedule and ask for help from your support system.</li> <li><input type="radio"/> Register for MedicAlert® Safely Home® for the person with dementia at 1-888-581-3794 if not already done so. <a href="http://www.medicalert.ca/safelyhome">www.medicalert.ca/safelyhome</a></li> </ul>	

<ul style="list-style-type: none"> <li><input type="radio"/> Assess living arrangements. Should consideration be made to move into a residential care home? (Retirement Home or Care Facility) Resource: <b><i>When a move is necessary Fact Sheet</i></b> <a href="http://www.alzheimerniagara.ca/resources">www.alzheimerniagara.ca/resources</a></li> <li><input type="radio"/> Write up a life history including key facts about the person’s life experiences that can be shared with care workers who come into the home. Resource: <b><i>All about me</i></b> <a href="http://www.alzheimerniagara.ca/allaboutme">www.alzheimerniagara.ca/allaboutme</a></li> <li><input type="radio"/> Tell your own doctor that you are a caregiver of a person with dementia so that your health can be monitored.</li> </ul>	
<p><b>Community services and taking a break</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> Now is the time to assess your need to bring in appropriate community services to assist. Resource: <b><i>Preparing for in-home help and support Fact Sheet</i></b> <a href="http://www.alzheimerniagara.ca/resources">www.alzheimerniagara.ca/resources</a></li> <li><input type="radio"/> Schedule breaks into your caregiving role. Resource: <b><i>Taking a Break: Why it’s Essential</i></b> <a href="http://www.alzheimerniagara.ca/resources">www.alzheimerniagara.ca/resources</a></li> </ul>	
<p><b>Legal and financial issues</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> Review income tax benefit options. Resource: <b><i>Financial Planning Fact Sheet</i></b> <a href="http://www.alzheimerniagara.ca/resources">www.alzheimerniagara.ca/resources</a></li> <li><input type="radio"/> Become familiar with the long term care application process.</li> <li><input type="radio"/> Assess financial resources against cost of increasing in-home support to keep person in their own home as long as possible.</li> </ul>	
<p><b>Relocation to a care facility</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> Work with community case manager or your Alzheimer Society Counsellor to determine when and where relocation will take place.</li> <li><input type="radio"/> Prepare person with dementia for the move. Resource: <b><i>When a move is necessary Fact Sheet</i></b> <a href="http://www.alzheimerniagara.ca/resources">www.alzheimerniagara.ca/resources</a></li> <li><input type="radio"/> On the day of the move, go with the person and stay until settled.</li> <li><input type="radio"/> To assist both you and the person with dementia, review the <b><i>After the Move Fact Sheets</i></b> which deal with adjustments for the caregiver, communicating and working with staff, and visiting. <b><i>After the Move: Adjustments for the Caregiver; After the Move: Communicating and working with the staff; After the Move: Visiting</i></b> <a href="http://www.alzheimerniagara.ca/resources">www.alzheimerniagara.ca/resources</a></li> </ul>	

Late stage planning	Who/When/Comments
<p><b>Education and support</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> Contact your local Alzheimer Society. Register for education sessions related to final stages of dementia. Register for a caregiver support group.</li> <li><input type="radio"/> Know that you will enter a new phase of grieving and that you will need to obtain support through this stage.</li> </ul>	
<p><b>Caregiving role</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> Whether person is at home with 24 hour care or in a care facility, your role is to inform, advise, recommend and encourage the best quality care.</li> <li><input type="radio"/> Provide the <b>“All about me”</b> history for care staff to read. Be sure it is up-to-date. Resource: <b>All about me</b> <a href="http://www.alzheimerniagara.ca/allaboutme">www.alzheimerniagara.ca/allaboutme</a></li> <li><input type="radio"/> Participate in activities with the person as appropriate and as you are able.</li> <li><input type="radio"/> If person is in a care facility, make the environment home-like. Decorate the room with seasonal decorations and appropriate articles from home.</li> <li><input type="radio"/> Spend positive time with the person: reminisce, recall humorous experiences, find comfort in the silence.</li> <li><input type="radio"/> Communicate according to communication abilities of the person. Be a good listener. Resource: <b>Day to Day Series – Communication</b> <a href="http://www.alzheimerniagara.ca/resources">www.alzheimerniagara.ca/resources</a></li> <li><input type="radio"/> Make sure that the end-of-life wishes of the person are communicated to health care staff.</li> <li><input type="radio"/> If a brain autopsy has been requested, ensure that the doctor, Retirement Home or Long Term Care Home and Funeral Home are aware</li> </ul>	
<p><b>Working with health care staff</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> Get to know the staff, maintain regular contact with them, see if you can participate in some activities, give positive feedback.</li> <li><input type="radio"/> If person is in a care facility, attend care conferences and participate in development of plan of care.</li> <li><input type="radio"/> If you have a concern about the care being provided, use effective communication skills when discussing with health care staff. Resource: <b>After the Move: Communicating and working with the staff</b> <a href="http://www.alzheimerniagara.ca/resources">www.alzheimerniagara.ca/resources</a></li> </ul>	
<p><b>Adjustments</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> Initially you may wish to visit often and then as the person adjusts to new environment, your visits may become less often.</li> <li><input type="radio"/> Enlist the help of your support system to sit with the person so that you can take a break.</li> <li><input type="radio"/> Plan a schedule for visiting with family and friends.</li> <li><input type="radio"/> Know that your life will change and you need to stay physically active and reconnect with pleasurable activities that you once enjoyed.</li> </ul>	

End stage planning	Who/When/Comments
<p><b>Education and support</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> Contact your local Alzheimer Society and gather information about end stage dementia and what to expect.</li> <li><input type="radio"/> Let others know what you are going through and seek support.</li> </ul>	
<p><b>Caregiving role</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> Goal is comfort care. Assist in providing comfort measures as appropriate.</li> <li><input type="radio"/> Maintain dignity of the person.</li> <li><input type="radio"/> The need for companionship remains. Stay calm and attentive and communicate through sensory experiences such as touch, music, reading aloud, reminiscing, etc.</li> <li><input type="radio"/> Reminisce – talk about favourite memories, play favourite music.</li> <li><input type="radio"/> Re-assure – “I’m here with you”, “You are safe”; use touch as in holding their hand.</li> <li><input type="radio"/> Provide spiritual support in line with person’s wishes and life history – for example: arrange pastoral care or faith leader visits; recite or play favorite readings, prayers, music.</li> <li><input type="radio"/> Make sure that health care staff know the person’s wishes for end-of-life care.</li> <li><input type="radio"/> Communicate with staff any signs of pain/discomfort.</li> <li><input type="radio"/> Communicate regularly with family members, friends on how person is doing.</li> </ul> <p>Resource: <b>Visiting in the late stage</b> <a href="http://www.alzheimer.ca/en/niagara/Living-with-dementia/Caring-for-someone/Late-stage-and-end-of-life/Visiting-in-the-late-stage">www.alzheimer.ca/en/niagara/Living-with-dementia/Caring-for-someone/Late-stage-and-end-of-life/Visiting-in-the-late-stage</a></p>	
<p><b>Caring for yourself</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> Share the care. Enlist others to sit with the person.</li> <li><input type="radio"/> Make sure you schedule in some physical exercise on a daily basis.</li> <li><input type="radio"/> Participate in grief support.</li> <li><input type="radio"/> Celebrate the life of the person you have been caring for and take satisfaction for the role you have played to promote quality life.</li> </ul>	