

Caregiver Assessment for Planning Sessions Rev 1.0

Purpose: To assist in managing stress of being a caregiver.

Method: This form can be done solo to help you consider different aspects that you might not have yet considered.

Planning Sessions with Charlie: I also offer sessions to work with folks to review this form and create a dialogue to help you get an objective view of where you are at in your caregiver role and where things might be headed. The name of the game is to avoid being caught off guard and that's what I like to help with.

To schedule your Planning Session I can be reached at livingcareanddesign@gmail.com

YOU

- Your age
- Are you the primary caregiver for your LO?
- Who else do you look after or that you are responsible for? (spouse, your own children, another family member?)
- What health issues do you have?
- How long have you been their caregiver?
- Do you live with the LO?
- If you don't live with your LO, how often do you visit them?
- How many hours a day is your presence needed with LO?

YOUR RELATIONSHIP WITH LO

- Who is it that you are taking care of? (child, spouse, friend, parent)
- Rate your feeling of trust and safety that you feel towards your LO.
- History of trauma and/or emotional abuse between yourself and your LO?

LO LIVING SITUATION AND CURRENT STATUS

- What is their current mobility? (walking, wheelchair, rollator, walker, bedridden)
- Can they do all Activities of Daily Living (ADL's)? (prepare their own food, dress themselves, go to the bathroom, shower/bathe?)
- Are they considered a fall risk?
- What health issues do they have?
- Is the place where they live safe/clean?
- Does your LO need added supports installed: support rails in the bathrooms, bench in the shower, ramps for wheelchairs?
- Pets, are they part of the scenario?
- Do they have hearing issues?
- Are they addicted to any substances (cigarettes, alcohol, drugs, pain pills?)
- Do they hallucinate or have night terrors?
- Are they a flight risk?

- Are they prone to anger or violence?
- Do they need to always have something on (TV, Radio, Music?)
- Can they safely drive alone?

YOUR SUPPORT SYSTEM

- Is your role as caregiver appreciated by your LO?
- Is your role as caregiver appreciated by extended family members?
- Do you have family members who acknowledge your LO needs care?
- Is there someone to step into your role if something happened to you? (is there "replaceability" built in to your situation?)
- How many helpers does your LO have to count upon besides you?
- Do you have family members who have not helped?
- Have you felt isolated as a caregiver?
- Are you having to cancel social outings and errands in order to remain home with the LO?

YOUR FINANCIAL SECURITY

- Are you currently retired?
- Do you normally work outside the home for income?
- Do you currently support others financially?
- Are you in a single or dual income earning household?
- Is your work and income being affected by your being a caregiver
- Have you lost your job because of caregiving?
- Have you lost your health insurance due to caregiving?

YOUR LO'S FINANCIAL SECURITY

- Has your LO assigned power of attorney?
- If so, is the POA also the primary caregiver?
- Do you know how to pay all of your LO's bills?
- Do you know how to monitor your LO's email accounts?
- Do you have the pw/un combos to all of their bills and banks, insurance?
- Do their bank and insurance companies have your POA on file?
- Do you have a chart of their accounts, mapping all financial ins/outs?
- How long will their existing money last based on their current budget/income?

INTERFACING WITH LO'S DOCTORS

- Is your name on your LO's HIPPA forms?
- Are you listed with all your LO's doctors to discuss their care?
- Do you have a tracking system for all daily medicines and prescriptions for your LO?
- Are you listed as the LO's emergency contact?

SPIRITUAL FOUNDATION and END OF LIFE

- have they received a 6 month end of life prognosis?
- has that 6 month prognosis been communicated yet to your local hospice?
- Is your LO at peace with their death and dying?

- Are you at peace with their death and dying?
- Are plans in place with hospice?
- Is there a funeral plan or a contract with a funeral home?
- Have they been able to express end of life wishes?
- Do they have Advanced Medical Directives in place?
- Do they have a Will?
- Is there a DNR?
- If so, is the DNR posted in obvious places in the home?