

Caregiver Preparedness: The Caregiver Notebook

The caregiver notebook can be documented in a simple three-ring binder and be used as a guide for your own needs and for anyone else who might step in to assist or take over. It is a diary and a guide book. The following is what you'll need, including a list of the information you may include in each section. It needn't be complete at the beginning. It can grow and adapt with your needs.

Caregiver Notebook:

- Three-ring notebook
- Notebook paper
- Tabbed dividers with pockets

1. Emergency Contact Information

- Family members, friends, neighbors
- Out-of-state contacts in case of natural disasters
- Medic Alert + Safe Return bracelet (include ID Number)

2. Emergency Plan of Action

- Person to call if you are incapacitated
- Person or facility to provide care in your absence

3. Health Information

- Physical conditions
- Mental health conditions
- Emotional conditions
- Family history
- Prescriptions (see Medication Record):
 - Name
 - Prescribed dosage
 - Instructions
 - Doctor's name
 - Pharmacy information
- Insurance policies – what is covered?
- Adaptive devices
- Fact sheets
- Daily observation notes
- Questions to ask doctors
- Lists of service providers/community resources
- Names, addresses and telephone numbers:
 - Doctors
 - Pharmacy
 - Hospital
 - Ophthalmologist
 - Audiologist
 - Medical supplies
- Vital numbers:
 - Social Security number
 - Medicare/Medi-Cal numbers
 - Insurance plan number
 - Claim assistance telephone numbers
- Physician visit notes – time, date, name, title, what they said
- Sample meal plans
- Calendar-keep track of appointments, prescription refills



4. Housing

- Basic home layout
- Emergency exit plan
- Wish list of remodeling projects
- Medical supply catalogues-daily living aids
- Government, community services
- Disaster preparedness kit

5. Providers

- Advertising brochures
- List of questions
- Conversation notes
- Resource lists

6. Legal Records

- Documents: (note where documents are located)
 - Birth certificate
 - Marriage certificate
 - Divorce decree
 - Social Security card
 - Military records
 - Naturalization records
 - Tax records
 - Health care power of attorney
 - Financial power of attorney
 - Living trust
 - Will
 - Health insurance policies
 - Medicare card and records
 - Medi-Cal card and records
 - Disability insurance policy
 - Life insurance policy
 - Funeral insurance
 - Funeral instructions
 - Cemetery plot deed
 - Real estate deeds
 - Mortgages
 - Apartment lease
 - Homeowner's insurance policies
 - Automobile pink slip
 - Automobile insurance policy
 - Appraisal/valuation of collections



7. Financial Records

- Documents:
 - Checking accounts (statements for 3 years)
 - Savings accounts (statements for 3 years)
 - Investment accounts (statements for 3 years)
 - Name, address and telephone numbers
 - Account numbers
 - Balance
 - How title is held
 - Stocks
 - Bonds
 - Royalties
 - Sources of monthly income
 - Monthly/annual expenses
 - Safe deposit box
 - Name address and telephone numbers:
 - Accountant
 - Attorney
 - Bankers

8. To Do Lists

- People to call
- Things to remember
- Responsibilities
- Documents to acquire
- Care reminders

We can help!
Alzheimer's Orange County
Call 844-HELP-ALZ
(844-435-7259)
For more caregiver tips
Visit us at
www.alzoc.org/resources

Compliments of Liz Ayers