

**20-30**
Minutes

Family Caregiver Workbook

This workbook is designed to support you in preparing for your caregiving journey of an aging loved one. There is a lot of complexity and stress in the role and while you can't plan for everything, you can be prepared to allow you to focus on what matters most: love.

Your Name:

Date:



YOUR LOVED ONE

This page allows you to begin organizing important information about your LovedOne all in one place. By documenting key details here, you'll have easy access to the information you need to share with healthcare providers, family members, and other members of your care team. It's a simple but powerful step to help you stay on top of your caregiving responsibilities and ensure your loved one's care is well-coordinated.

LovedOne's Name

LovedOne's Birthday

LovedOne's Address

LovedOne's Phone Number

LovedOne's Insurance(s)

e.g. Medicare, XX32145



LovedOne's Active Conditions & Year Diagnosed



PAST MEDICAL HISTORY & MEDICAL TEAM

Understanding your LovedOne's past medical history is crucial for providing the best possible care and ensuring their current healthcare team has all the information needed for informed decisions. This knowledge not only benefits your LovedOne's treatment but can also provide valuable insights for future generations about potential hereditary conditions. Keeping track of their medical history and current healthcare providers helps ensure continuity of care and better health outcomes.

Past Condition(s) & Year Diagnosed



e.g Breast Cancer, 2001

Medical Team

Name

Specialty

Phone Number

Medical System

LovedOne's Pharmacy



Name, address, phone number



THE CARE TEAM

As a primary caregiver, it's important to identify who can help you take care of your LovedOne. Whether it's emotional, physical or logistical support, a care team in place can make a significant difference. Use this space to reflect on who can be part of your care team and how they can contribute.

Emotional Support

Who can provide encouragement and comfort? Who does my LovedOne trust with their emotional fears?

Physical Support

Who can assist with daily activities? Who has access to transportation and can take my LovedOne to their appointments or grocery shopping?

Logistical Support

Who can help schedule appts? Who can communicate well with the medical team or insurance company? Who can help manage paying bills?





IMPORTANT LEGAL DOCUMENTS

Navigating the legal aspects of caregiving is essential to ensuring your LovedOne's wishes and property are protected. This checklist provides key documents you should have to help you make informed decisions. Having these in place early will help you prepare for various situations that may arise.

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Power of Attorney

This document allows caregivers to act on behalf of their loved one if they become incapacitated. This may include financial and legal decisions as well as medical decisions.

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Advance Directive

This document outlines the loved one's preferences for medical treatment and end-of-life care, ensuring their wishes are followed.

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HIPAA Waiver

This permits healthcare providers to share medical information with the caregiver, ensuring they can access necessary health records and communicate with medical professionals.

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Wills & Trusts

These documents specifies how the loved one's assets should be distributed after their death and names an executor to manage the estate.

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Financial Information

Keeping updated records of bank accounts, investment accounts, retirement accounts, and other financial documents is crucial for managing finances.

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Insurance Information

Having copies of health, life, disability, and long-term care insurance policies ensures the caregiver can manage claims and coverage.

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Identification documents

Copies of the loved one's Social Security card, birth certificate, passport, and driver's license are essential for various legal and administrative tasks.



YOUR SELF-CARE

As caregivers, it's easy to focus entirely on the needs of those we care for, often at the expense of our own well-being. Take your time. This page is designed to help you reflect on your personal experience, acknowledge the challenges you face, and identify ways to manage the stress that can come with caregiving. Remember, taking care of yourself is an essential part of being able to care for others.

The top 3 things as a CareHero that stress me out are:

The emotional signs that I experience when I am stressed out are:

Physical symptoms I experience when I am stressed out are:

The top 3 things that help me relax or recharge are:

How can I ask others for help?

What boundaries do I need to set to protect my time and energy?

Who supports me during difficult times?



THANK YOU FOR BEING A CAREHERO!

Caregiving is challenging and taking the time to organize the details in this guidebook is a great first step in managing the complexity of it all. We know that caregiving involves much more and that's why HeroGeneration is dedicated to developing a comprehensive platform to support you every step of the way. We are here to help you navigate the full scope of caregiving with resources and tools designed to make your caregiving journey easier.

To learn more about HeroGeneration, check out our website
herogen.co

Email us at hello@herogen.co with questions or comments.

Additional Resources

- [HeroGeneration LinkedIn for Caregiving Articles](#)
- [The Conversation Project - Conversation Starter Guide](#)
- [Institute on Aging - Friendship Line](#)
- [AARP - Resources for Caregivers and their Families](#)

Digital Platform Coming Soon!

Sign up at herogen.co to be among the first CareHeroes to try it out!

