

## **HOW TO ORGANIZE YOUR CAREGIVING INFORMATION & PAPERS**

One of the simplest ways to reduce caregiving stress is by getting your papers organized in a way that is easy for you to work with. Here are some helpful tips to get you started.

Keep a calendar some place visible & enter all appointments / activities for your caree as well as any other commitments you or your family may have.

It's a good idea to keep a notebook where you log everything related to caregiving. You can jot down notes from telephone conversations, including the doctor's name (for example), the date, time, any instructions, etc. Also write down appointments, new symptoms, other observations or your thoughts on any particular issue that you feel needs to be discussed with a medical professional.

You can also write reminders for yourself and include a date or time when that task needs to be done. Use highlighters of different colors to emphasize important entries, such as appointments or deadlines to submit paperwork. This way, you won't have to keep dozens of tasks in your head. Just be sure to check your notebook frequently.

### **SETTING UP FILES FOR YOUR PAPERWORK:**

1. Designate a place to store all caregiving papers and information - be sure it is a space large enough to accommodate all of them. In time, you may need to remove older papers / files and just keep handy what you use regularly or what is from the current year.
2. Get about 25 manila folders, a thick marker, labels or colored card, Scotch tape and scissors.
3. Create labels per the list supplied below or adjust as needed, depending on your caregiving needs.
4. Go through your papers and file them in the appropriate folder.
5. Organize the papers within each folder from newest to oldest or vice versa - whichever you prefer. I prefer having the latest paper so it is the first thing I see when I look in the folder.
6. Create new folders as needed.
7. When your files get too large, you can remove the earliest papers or create a new one for the current year. Place the removed / older files in one location in your home so that everything is together. You never know when you will need them.
8. Be sure to put away all papers once you are finished using them. This system will only be as organized as you keep it! A little bit of time on your part will save you lots of time / stress later!
9. Print 2 copies of the forms below. Fill one set & keep blanks ready for making more copies as needed.

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**TO HELP YOU ORGANIZE YOUR PAPERS, HEALTH INFORMATION, MEDICATIONS, COORDINATE CARE, SHARE INFORMATION, UPDATE FAMILY & FRIENDS:**

## **WEBSITES**

[CAN: Caregiver Action Network](#) - coordinate care, track medications, share information...

[MonarCares.com](#) - coordinate care, track medications, share info with family & friends, reminders...

[SeniorCareOrganizer.com](#) - organize information and tasks for loved ones

[eCareDiary.com](#) - coordinate care, organize documents, manage appointments, track medications

[eCaring.com](#) - manage & monitor loved one's condition, share info, send alerts

[CaringBridge.org](#) - share updates via your private website, coordinate care...

[CareZone.com](#) - share info, coordinate care, track medications...

[LotsaHelpingHands.com](#) - coordinate care, calendar, share info...

[CarePages.com](#) - share info with family & friends through secure private website

[Medicine-On-Time.com](#) - pharmacy packaged meds labeled and sorted for when you need to take them

[Cozi.com](#) - calendar, to do lists, manage family life & coordinate activities

## **APPS FOR YOUR MOBILE DEVICE**

[Express-Well.com](#) - keep your information handy for doctor's appointments, store health records

[OnTimeRx.com](#) - reminders to take your meds on time

[CareZone for iDevice](#) & [CareZone for Android](#) - share info, coordinate care, track medications...

[MedCoach Medication Reminder for iDevice](#) & [MedCoach Medication Reminder for Android](#)

[Cozi.com](#) - calendar, to do lists, manage family life & coordinate activities

[CareWell](#) - ask for & coordinate care [coming early 2014]

[Unfrazzle](#) - coordinate care, manage tasks, reminders

[InvolveCare](#) - coordinate care, organize tasks

**FILES FOR CAREGIVING PAPERS**

HEALTH RECORDS - lab results, prescriptions, treatment plans, etc.

LIST OF MEDICAL CARE TEAM WITH CONTACT INFO

LIST OF HELPERS & EMERGENCY CONTACTS

HEALTH INSURANCE BILLS / STATEMENTS

MEDICAL BILLS & RECEIPTS - lab fees, equipment fees, supply receipts, etc.

PHARMACY PRESCRIPTION PRINTOUTS THAT COME WITH MEDICATIONS

SOCIAL SECURITY - correspondence received & sent by you, copy of forms you filled & sent to them, log of calls with date & name of agent...

MEDICARE - reports, bills, expenses, correspondence, forms, log of calls, etc.

MEDICAID - reports, bills, expenses, correspondence, forms, log of calls, etc.

LIST OF MEDICATIONS TAKEN - see form below

IN-HOME CARE OR NURSE VISITS LOG / NOTEBOOK - if applicable

TAX-RELATED PAPERS - medical expenditures that reach certain levels may be tax deductible. Consult your tax preparer, IRS or Turbo Tax to see what documents you will need.

ADVANCE DIRECTIVES, WILL, POA (MEDICAL & DURABLE), END-OF-LIFE WISHES

LIST OF ACCOUNTS OR CURRENT BILLS / STATEMENTS - credit / debit cards, bank, safe deposit box, utilities, insurance policies (auto, health, home, life), stocks, retirement, IRA, investments...

LOCATION OF IMPORTANT PAPERS - passport, driver's license, birth certificate, marriage license, etc.

CAREGIVER'S NOTEBOOK - log of everything related to caregiving, with dates



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## CARE TEAM - PEOPLE WHO HELP ME WITH CAREGIVING

PATIENT: \_\_\_\_\_ DOB: \_\_\_\_\_

EMERGENCY CONTACTS \_\_\_\_\_ DATE: \_\_\_\_\_

| NAME | PHONE / EMAIL | ADDRESS |
|------|---------------|---------|
|      |               |         |
|      |               |         |
|      |               |         |
|      |               |         |
|      |               |         |
|      |               |         |

PRIMARY CAREGIVER: \_\_\_\_\_

PRIMARY CAREGIVER'S PHONE: \_\_\_\_\_

PRIMARY CAREGIVER'S EMAIL: \_\_\_\_\_

ADDITIONAL CAREGIVER: \_\_\_\_\_

ADDITIONAL CAREGIVER'S PHONE: \_\_\_\_\_

ADDITIONAL CAREGIVER'S EMAIL: \_\_\_\_\_

ADDITIONAL CAREGIVER: \_\_\_\_\_

ADDITIONAL CAREGIVER'S PHONE: \_\_\_\_\_

ADDITIONAL CAREGIVER'S EMAIL: \_\_\_\_\_





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