

# CAREGIVER STARTER KIT

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## QUICK START GUIDE

If you're stepping into caregiving, it can feel overwhelming fast. This kit is designed to help you get organized without overthinking it. You don't need to do everything at once—just start here.

### **Step 1: Set Up Your System**

Start with the Caregiver System Setup Checklist.

- Get essential information in one place
- Identify what's already handled
- See what still needs attention

Don't worry about perfection—just work through it one step at a time.

### **Step 2: Keep It Simple**

Use the Tracking System Overview as your guide.

Focus on what matters most:

- Medications
- Vitals (if needed)
- Daily routines

Keep it manageable so you can stick with it.

### **Step 3: Track Daily Care**

Use the Caregiver Daily Log to track what matters each day.

- Stay organized
- Communicate with other caregivers
- Notice changes over time

Consistency matters more than detail.

Caregiving is something you learn as you go.

Start small, stay consistent, and adjust as needed.

## CAREGIVER SYSTEM SETUP CHECKLIST

### **Medical**

- Establish Primary Doctor
- Update Medication List
- Create Emergency Contact List
- Schedule Follow-Up Appointment

### **Home Safety**

- Remove Trip Hazards (Rugs, Cords)
- Install Grab Bars
- Shower Chair in Place
- Toilet Seat Riser for Seniors
- Walker and Mobility Aids Accessible
- Chairlift and Accessibility Reviewed
- Adequate Lighting, Flashlight and Batteries
- Baby Monitors (Audio Monitors)
- Chair Alarm Pads
- Bed Rails and Safety Guards

### **Financial and Legal**

- Power of Attorney (Medical & Financial)
- Update Trust and Will
- Organize and Track Bills
- Bank Access Secured
- Financial Advisor and Attorney Identified
- Insurance Policies Reviewed

### **Caregiver Setup**

- Interview Caregiver and Agency
- Copy of Caregiver Drivers License and Auto Insurance
- Caregivers Current Address and Phone Number
- Pay Structure and Schedule Set
- Expectations Clearly Defined
- Backup Coverage Plan

- Communication Management (Group Chat/Logs)
- Medication Tracking System
- Appointment Calendar
- Caregiver Notes Reviewed Daily
- Meal Planning and Groceries
- Weekly Check-in Routine
- Order Care Necessities (Disposable Gloves, Diapers, Ointments)
- Order Compression Support (Garments and Socks)
- Medical Tools (BP Cuff, Glucose Meter, Thermometer)
- First Aid Kit
- Home Maintenance, Repair and Services

### **End of Life Planning**

- Advanced Healthcare Directives
- HIPAA Document (Patient Privacy Authorization)
- DNR / Medical Preferences Documented
- Final Wishes (Burial/Cremation/Service)
- Key Contacts List Prepared
- Important Documents Accessible



## CAREGIVER SYSTEM SETUP CHECKLIST

### TRACKING SYSTEM OVERVIEW

#### **What to Track (Simple System):**

- Medications and Any Changes
- Vitals (if needed)
- Appointments and Outcomes
- Caregiver Schedule
- Financial Obligations (Bills, Care Costs)

#### **Tools You Can Use:**

- Spreadsheet (Simple and Flexible)
- Shared Calendar (Appointments and Caregiver Shifts)
- Group Chat (Daily Communication)
- Notebook or Binder (Backup Reference)

**These programs can provide financial and in-home support that many families don't realize they qualify for.**

**VETERANS AFFAIRS (VA) SUPPORT**

- Determine if your loved one is a veteran
- Locate discharge papers (DD214)
- Confirm VA Health Care enrollment status
- Apply for VA Health Care if not enrolled
- Explore Aid & Attendance benefit eligibility
- Ask about available in-home care services through the VA
- Review eligibility for caregiver stipend programs
- Contact local VA office for support coordination
- Keep copies of all submitted paperwork
- Follow up regularly on application status

**Notes:**

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## **IN-HOME SUPPORTIVE SERVICES (IHSS)**

**In-Home Supportive Services is administered at the county level, but eligibility is tied to Medi-Cal.**

General Guidelines (simplified)

- Eligibility is tied to Medi-Cal, which includes income and qualification guidelines.
- Even if you're unsure whether you qualify, it's worth applying or speaking with your county office.
- Limits vary depending on:
  - Individual vs. couple
  - Age/disability status
  - Type of Medi-Cal program

To receive IHSS, the individual must:

1. Be enrolled in Medi-Cal
2. Live at home (not in a facility)
3. Need help with daily living activities
4. Pass a functional needs assessment (by a county social worker)

- Confirm Medi-Cal eligibility
- Enroll or be enrolled in Medi-Cal
- Live at home (not in a facility)
- Schedule in-home assessment with social worker
- Document daily care needs accurately
- Review approved monthly care hours
- Select caregiver (family member or hired)
- Set up caregiver timesheet system
- Track caregiver hours consistently
- Request reassessment if needs increase
- Keep records of all communications