

ESSENTIAL SURVIVAL GUIDE FOR  
CAREGIVERS

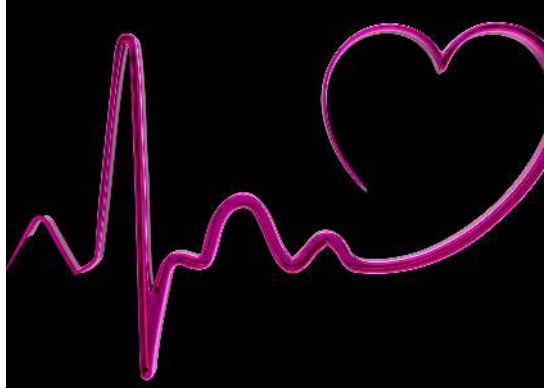
# EMPOWER YOURSELF AND YOUR LOVED ONES

Family Caregivers' Planning Necessities



"Caring for someone with love and compassion is the greatest gift you can give." -Unknown

# Top 7 Planning Issues for Family Members who are Caregivers



***Do you have a personalized routine for physical, emotional, and mental well-being? What's your strategy for preventing burnout?***

**Compliments of:**

***Deborah S. Greenhut, PhD, The Rational Caregiver***

**Use this planning guide to prevent your feelings from overwhelming your thinking. Caregivers must navigate numerous systems to be successful, and the one system they often overlook is their own.**

**It helps to think of yourself as a manager rather than an employee. You may think you have no one to delegate to, but if you don't prioritize and create a team, you may be rapidly overwhelmed. Please accept this advice as a kindness. As a doctor told me, "You cannot do this (caregiving) by yourself!"**

***The information contained in this booklet is not a substitute for professional advice from attorneys, healthcare, or other professionals. Make sure to consult professionals to create the best plans. The suggestions come from my experience as a lay caregiver.***

## 7 Planning Issues to Consider

1. Planning for Daily Self-Care
2. Planning for a Support Network
3. Planning Finances
4. Planning to Manage Healthcare
5. Planning for the Legal Aspects
6. Planning for Emergencies
7. Planning to Manage Your Time

### **Tips:**

**\*\*Think you can't delegate?** Think again.. There's a tremendous amount of research you will need to do. Relatives and friends can help without traveling. Family caregiving takes a village--at least a strong team. Ask. People who may not be able to come to help may be able to research issues like finances and insurance from home.

**\*\*Feeling alone?** Consider hiring a geriatric social worker or care manager to help you find resources and think through issues. If time is money to you, this person can save you on research time and recommend solutions you might not find on your own.

*Use the worksheets to determine what you will need and who can help you.  
Estimate the time it will take to create these resources.*

# 1. Planning for Daily Self-Care

Caregivers are often tempted to postpone or avoid activities that would sustain their physical, emotional, and mental well-being. To prevent burnout, recognize the value of exercise, meditation, and hobbies of passion projects.

Who Can Help Me do this?

What Activities Will I Do?

When Will I Do Them?

Where Will I Do Them? And Where Will I Get the Resources to Do Them?

Why will I do them?

How will I make the time do them??

## 2. Planning for a Support Network

Following your own routine, you'll need to plan one for your loved one. As you plan, don't limit yourself to other family members, who may not choose to or be able to help you. Do not stint on the professional services you may need and accept the emotional support people can offer you. The search for a perfect solution may be futile.

*Who will help you? Who will relieve you for rest and recuperation? Who recognizes you and respects your role?*

*What will you need the most help with? What kind of help do you prefer--people or funding? Paid or volunteer?*

*When will you need help? What will you do when helpers can't help?*

*Where will people support you? Where are the agencies who can help to share the burden?*

*Why do people offer to help--or not? Why are you asking? (It helps to be strategic about motivation because you may need to sell the idea to people who expect a reward.)*

*How will you make it work? How will you function if you are sick?\_ How does your system fit together?*

### 3. Planning Finances

Budgeting, insurance, and financial resources must be ongoing top-of-mind issues for family caregivers. Learning the tools and systems your loved one has or lacks will be time-consuming.

*Who will help you? Who was helping your loved one before you came? Will you have the authority to spend money? Will those who can't be present contribute money gifts to help those who are?*

*What will you need the most help with? What kind of help do you prefer--people or funding? Paid or volunteer? Will Internet explanations solve the problem or will you need to hire advisors?*

*When will you need help? What will you do when helpers can't help?*

*Where will people support you? Where are the agencies who can help to share the burden?*

*Why do people offer to help--or not? How will you know if they're knowledgeable?*

*How will you make it work? How will you function if you are sick? How does your system fit together? How much money do you need? How will you make up the difference?*

## 4. Planning to Manage Healthcare

The healthcare system can require a skillful navigator, driver, appointment setter and manager, a legal expert on patient rights, an administrator, and an advocate.

*Who will help you? Who is empowered to make decisions?*

*What will you need the most help with? What will you do if you disagree with a medical provider or an insurance company?*

*When will you need help? When do you feel comfortable making decisions?*

*Where will people support you? Where are the agencies who can help to share the burden? Where are the important papers?*

*Why do people offer to help--or not? How will you know if they're knowledgeable? When and why might you change medical providers or insurance coverage? How will you predict the pluses and minuses of decisions? How did your loved one make those decisions?*

*How will you make it work? How will you function if you are sick?*

## 5. Planning for the Legal Aspects

Apart from health issues, other legal matters may need to be addressed, particularly when important papers are missing.

*Who will help you? Who is empowered to make decisions?*

*What will you need the most help with? What will you do if you disagree with an attorney or a do-it-yourself strategy fails?*

*When will you need help? When do you feel comfortable making decisions?*

*Where will people support you? Where are the agencies who can help to share the burden? Where are the important papers?*

*Why do people offer to help--or not? How will you know if they're knowledgeable? When and why might you change attorneys? How will you evaluate decisions? How did your loved one make those decisions? What if there is no will? What if the loved one wants or needs to leave it all up to you?*

*How will you make it work? How will you function if you are sick? Is there a contingency plan if you cannot help?*



## 6. Planning for Emergencies

You cannot plan for every situation or emergency, but you can keep handy the contact information for professionals, a list of medications, and you can develop a method and a plan for handling emergencies, including other points of contact and a list of things people should know if they haven't met the person before.

*Who will help you? Who is empowered to make decisions? Who is your backup if you need a substitute?*

*What will you need the most help with? Which parts of your loved one's current system need improvement?*

*When will you need help? Define the conditions you would describe as an emergency?*

*Where will people support you? Where are the agencies who can help to share the burden? Where are the important papers?*

*Why do people offer to help--or not? Are you on your own in a crisis?*

*How thin are you stressed without the emergency? How will you make it work? How will you function if you are sick? Is there a contingency plan if you cannot help?*

## 7. Planning to Manage Your Time

We looked at time in terms of Self-Care, but that can't even begin if you do not organize the big picture of everyone's time within your caregiving system. One missed doctor's appointment--for whatever reason--can throw off weeks of careful planning for other activities.

*Who will help you? Who is empowered to make decisions? Who is your backup if you need a substitute?*

*What will you need the most help with? Which parts of your loved one's current system need improvement?*

*When will you need help? Define the conditions you would describe as an emergency? You are likely managing more than a dozen systems for your loved one, so it's important to understand the duration of activities.*

*Where will people support you? Where are the agencies who can help to share the burden? Where are the important papers?*

*Why do people offer to help--or not? Are you on your own in a crisis?*

*How much time will you devote to caregiving? How will you make it work? How helpful can your person be? How much discretionary time do you have?*

## *A Message from Deborah S. Greenhut, PhD*

The issues I've mentioned represent some basic concerns you need to address. There will likely be others, unique to your situation with your loved one. The world may quickly divide into helpers and non-helpers, and some helpers may be better than others. However, that goes, you cannot do it alone, and you need to plan as much as you can before you start caregiving.

Because you care about your loved one, it's tempting to ignore what your critical thinking powers are telling you, even if those decisions are not supported or you have no help to implement them. But sacrificing your health, and possibly your life,, and possibly your life are not good decisions. Choose rational caregiving for your sake and for the sake of the ones you care about.

*Make a plan to keep the joy in your life!*

**Contact me today if you have questions:**

**[Deborah's Contact Form](#)**