

Care Planning Checklist for Care Partners

EARLY STAGE PLANNING

Early Stage Planning

Living with dementia can cause big changes in individuals and families' future plans. Care partners must consider how life needs and wishes may change as a person's dementia progresses.

Each person living with dementia is unique, and your relationship as a care partner will develop in its own way.

Use the checklist below as a guide to help plan ahead. Each activity is a suggestion. This guide may not fully cover everything that applies to your own circumstances.

- Use the “who/when/comments” column to write down anything you need.
- This can be reminders, information, appointment details, etc.
- The “✓” column is a checkbox for you to fill out when you finish the task.
- Click on the links in the Resource Links column to access additional information and resources.

This will help you keep track of your progress.

Feel free to reach your local Alzheimer Society. If you live in Alberta or the Northwest Territories, you can call us at: **1-866-950-5465**.

To navigate through the checklist, use your mouse to hover over the item in the Table of Contents that you wish to move to, then click to proceed to that item.

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Glossary:

Here are some common terms that will be used throughout the document. You can refer to the top of the document to understand terms used. Below are common terms used in the checklist. You can refer to these when you need reminders of the definitions.

Enduring Power of Attorney** (EPOA) is a legal document that gives a trusted person the permission to make financial decisions on your behalf. This document only comes into effect when it is **enacted (see definition below)

Personal Directive** is a legal document that gives a trusted person the permission to make personal, non-financial decisions (example: where to live, healthcare decisions, and others) on your behalf. This document only comes into effect when it is **enacted (see definition below)

***Enacting** the above documents means the documents take effect. When enacted the agent or Power of Attorney makes the decisions on behalf of the person. *We encourage you to complete the enacting process with the guidance of your lawyer and health care professional as each document will contain specific instructions.* Until that time, we encourage care partners to take on a supportive role with the person living with dementia to maintain their independence.

***Legal Will** is a legal document that allows you to name your representative, who oversees distributing your property, following instructions on your will and naming the guardian of your minor children at the time of your death.

***Advance care planning** is how you discuss, plan, and document your wishes for the health care you want to receive now and in the future.

***Green Sleeve:** In Alberta, you can store your important Advance Care Planning documents (such as Personal Directives, Goals of Care Designation) in a green plastic pocket. You should take your Green Sleeve any time you access the Alberta Healthcare system.

* **Supported Decision-Making:** Even if an adult is capable of making decisions, there may be times when they need someone to help them make personal decisions not related to financial matters. This is called supported decision-making.

Education and Support	Resource Links	Who/When/Comments	✓
<p>Contact your local Alzheimer Society. Through the Alzheimer Society of Alberta and Northwest Territories, you can sign up for:</p> <ul style="list-style-type: none"> • First Link® Connection session • Seeds of Hope Learning Series • Support groups <p>We have in person, hybrid and online options.</p>	<p>Contact your local Alzheimer Society Offices in Alberta and Northwest Territories Alzheimer Society of Alberta and Northwest Territories Or call us at 1-866-950-5465 First Link First Link® Alzheimer Society of Alberta and Northwest Territories By Us For Us guide: Living and Transforming with Loss and Grief (the-ria.ca)</p>		
<p>Register for support groups.</p>	<p>Community Support</p> <p>Call 1-866-950-5465 for more information and to reserve your space in support groups Programs and services Alzheimer Society of Alberta and Northwest Territories Finding help: Finding help Alzheimer Society of Canada</p>		
<p>Consult 211 to identify the community resources available in your area. Create a list for yourself.</p>	<p>211 Alberta: https://ab.211.ca/</p>		

<p>Plan to talk or meet with other family members and close friends. Have open discussions with the person living with dementia regarding their wishes. Ensure everyone is aware of those wishes.</p>	<p>Family support</p> <p>First steps for families after diagnosis: First steps for families after diagnosis Alzheimer Society of Canada</p> <p>Reducing caregiver stress: Reducing caregiver stress Alzheimer Society of Canada</p> <p>Helping Children Understand: Helping children understand dementia Alzheimer Society of Canada</p> <p>Helping Teens Understand: Helping teens understand dementia Alzheimer Society of Canada</p>		
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Community Support	Resource Links	Who/When/Comments	✓
<p>Identify your support system and what they specifically can do to help. This can be friends, family and others in your community.</p> <p>Asking for help can be difficult. Many people want to help but don't know how. The Alzheimer Society of Alberta and Northwest Territories can help with timely tips.</p>	<p>Call 1-866-950-5465 for more information</p> <p>Finding help: Finding help Alzheimer Society of Canada</p> <p>211 Alberta: https://ab.211.ca/</p>		
<p>Consider creating a weekly or monthly schedule. This helps plan your activities and appointments and those of the person living with dementia. It is important to include time for yourself in the schedule.</p>			
<p>Consider steps for living safely in the community.</p>	<p>Living safely and independently Alzheimer Society of Canada</p> <p>Finding your way: Living safely with dementia – Finding Your Way (findingyourwayontario.ca)</p>		
<p>Make a list of everyone you can call in an emergency. Write down their contact information. Include contact information of the health professional that works with the person living with dementia.</p>			

Employment	Resource Links	Who/When/Comments	✓
<p>For care partners who are working: it is important to know about work policies. Illness or personal leaves may apply to your situation in the future.</p>	<p>Long Term Illness Leave: Long-term illness and injury leave Alberta.ca</p>		
<p>Ask questions about employer insurance plans regarding long-term disability and government programs.</p>	<p>Government programs: Disability insurance - Canada.ca Alberta specific programs Personal and family responsibility leave Alberta.ca</p>		

Legal Issues	Resource Links	Who/When/Comments	✓
Engage and support the person living with dementia in completing the following:			
Enduring Power of Attorney *(EPOA*) for property and finances are up-to-date and signed.	EPOA in Alberta: Enduring power of attorney Alberta.ca		
Personal Directive * is up-to-date and signed.	Personal Directive in Alberta: Personal directive Alberta.ca		
Legal Will * is updated and in place.	Wills in Alberta: Wills in Alberta Alberta.ca		
Advance Care Planning * discussions are encouraged. This allows everyone to be aware of wishes for how to live better.	Advance Care Planning Advance Care Planning Compassionate Alberta My Wishes Workbook: My Wishes Alberta Workbook Compassionate Alberta		
Once completed and signed, keep all legal documents in a safe place. In early stage, your role is to support your person living with dementia to remain independent. When the time comes for enacting * the documents, you will do this in collaboration with your health care professional and/or lawyer.			

Finances	Resource Links	Who/When/Comments	✓
<p>Ensure Enduring Power of Attorney* (EPOA) is signed. Check with your bank about whether a certified or notarized copy will be needed in the future.</p>	<p>EPOA in Alberta: Enduring power of attorney Alberta.ca</p>		
<p>Discuss with the person living with dementia how they would like to be supported:</p> <ul style="list-style-type: none"> - with their banking activities. - to ensure nothing suspicious goes on in their account (like hackers or scammers). <p>Your role as a care partner is to support your person living with dementia to maintain their independence and dignity.</p>			
<p>Make a list of household information such as utility companies/organizations home/auto/life insurance you are using.</p> <p>With the person's consent, consider changing the main contact information to be under the care partner's or designates' name.</p>			
<p>Encourage the person living with dementia to register on the National 'Do Not Call' list. Support them if they require assistance. This will reduce telemarketing calls.</p>	<p>National Do Not Call List - Canada.ca Innate-dncl.gc.ca</p>		

<p>Apply for financial assistance programs.</p>	<p>Alberta Supports: Alberta Supports Alberta.ca Toll-free: 1-877-644-9992</p> <p>Income Support: Income Support Alberta.ca</p> <p>Canada Pension Plan (CPP): Canada Pension Plan - Overview - Canada.ca</p>		
<p>Check and use tax benefits.</p>	<p>Canada Caregiver Credit: Canada caregiver credit - Canada.ca</p> <p>Disability Tax Credit: Disability tax credit (DTC) - Canada.ca </p>		

Getting Organized	Resource Links	Who/When/Comments	✓
<p>Keep a record of all health information, including a list of medications. You can add it to your green sleeve* or a Capsule of Life®.</p> <p>Update it regularly and store it in an accessible place. On top of your fridge is a common suggested place.</p>	<p>Personal Health Record</p> <p>Alberta: myhealthrecords (alberta.ca)</p> <p>Northwest Territories: Accessing or Correcting Personal Health Information Health and Social Services (gov.nt.ca)</p> <p>Advance Care Planning and Green sleeve: Advance Care Planning: Keep important information in a Green Sleeve (alberta.ca)</p> <p>Capsule of Life®: Capsule of Life® - EMS Foundation</p>		
<p>Discuss with the person living with dementia if they would be interested in taking to their appointments a trusted person to take notes. This trusted person can have their permission to speak with their health care professionals: see Supported Decision Making*.</p>	<p>Alberta Supported Decision-Making: Supported decision-making Alberta.ca</p>		

<p>Observe the person's ability to do activities of daily living. This includes activities such as: driving, cooking, cleaning, etc. The changes of dementia may create safety issues.</p>	<p>Safety Considerations</p> <p>Driving: Helping a person get around safely with dementia – including driving, walking and more Alzheimer Society of Canada</p> <p>Safety at Home: Making your environment safe Alzheimer Society of Canada</p> <p>Living Alone: Living safely and independently Alzheimer Society of Canada</p> <p>Living Alone – Moving someone living with dementia in with you: Inviting someone to move in with you Alzheimer Society of Canada</p>		
<p>Begin to familiarize yourself with the additional help available in your area.</p>	<p>Continuing Care – Home Care, Supportive Living, and Long-Term Care: Continuing Care Alberta Health Services</p> <p>Continuing Care – Self-Managed Care: Self-Managed Care brochure (albertahealthservices.ca)</p>		

Adapted from Alzheimer Society of Alberta and Northwest Territories
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Alzheimer *Society*

ALBERTA AND
NORTHWEST TERRITORIES

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