



PRESBYTERIAN
SENIOR LIVING

The Ultimate Caregiver Toolkit



**Tips And Resources
for Family Members
Caring for a Senior Loved One**



TABLE OF CONTENTS

- Introduction 3
- In this Guide 3
- SECTION 1: Advocating Effectively for Healthcare.....4-5
 - Understanding Your Role as a Healthcare Advocate 4
 - Preparing for Medical Appointments..... 4
 - Communicating With Healthcare Providers..... 5
 - Asking the Right Questions 5
- SECTION 2: Planning and Organizing Daily Care 6
 - Daily-Care Planning Sheets 6
 - Symptom-Monitoring Calendars 6
 - Emergency Contact Information..... 6
- SECTION 3: Managing Stress and Practicing Self-Care.....7
 - Identifying Early Signs of Burnout..... 7
 - Implementing Stress-Management Strategies for Caregivers..... 7
 - Creating a Realistic Self-Care Plan 7
- SECTION 4: The Emotional Side of Caregiving.....8-9
 - Navigating Emotional Triggers..... 8
 - Dealing With Family Conflict Amid Caregiving 9
 - Coping With Isolation and Loneliness..... 9
- SECTION 5: Resources and Support Systems10-11
 - Support Groups 10
 - Community Resources..... 10
 - Care Apps and Tools 11
 - PA CareKit..... 11
- Conclusion: You’re Not Alone 12
- Addendum13-18
 - Daily Caregiver Task Checklist..... 13
 - Daily Dose Checklist 14
 - Emergency Contact Information..... 15

Introduction

Taking on the role of caregiver for a senior loved one can be a big responsibility. While many people start out by helping with just a few simple tasks, such as picking up a prescription or changing a few light bulbs, their duties often evolve into a full-time endeavor. In most cases, family caregivers have little to no training, especially when it comes to health-related tasks. It can leave them with a variety of challenges and fears, both emotional and physical.

That's why we created this toolkit—to share information and resources that will make this role a lot easier and more rewarding.



Inside this Guide

In this toolkit, you'll find solutions for managing the aspects of caregiving that family members struggle with the most. We'll discuss how to effectively advocate for your loved one in healthcare settings and offer tips and resources for staying organized. We'll also share information about self-care, including how important it is for caregivers to take care of themselves. Finally, you'll find templates that will make it easier to effectively juggle a variety of caregiving tasks.

SECTION 1:

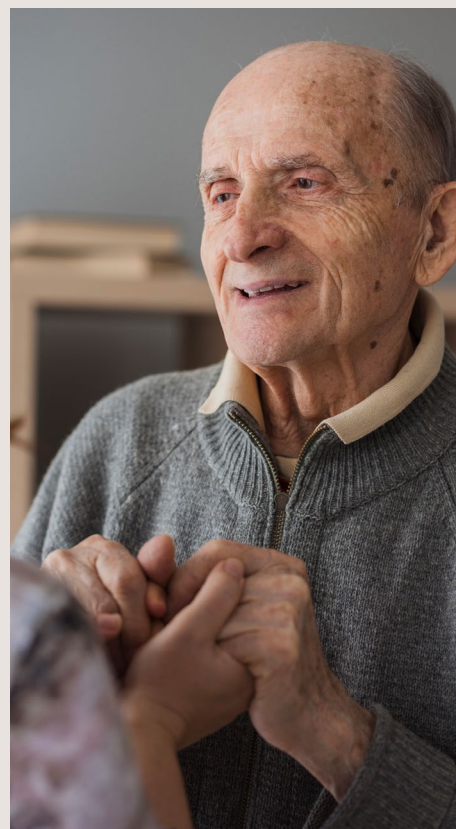
The Importance of Daily Self-Care Routines

- **Understanding Your Role as a Healthcare Advocate**

A family caregiver's responsibilities include being a healthcare advocate. This essential and multifaceted role involves representing the care recipient's medical needs, preferences, and rights within the healthcare system. It includes attending appointments, asking the right questions, sharing information and concerns with the physician, and coordinating details related to care. As a healthcare advocate, you could think of yourself as a voice, protector, and communicator for your loved one.

- **Preparing for Medical Appointments**

- **What to Bring:** This may vary, depending on what physician or specialist your family member is seeing, but at a minimum, you'll need to bring a list of current medications and any symptoms/concerns you wish to discuss. If the provider is outside your regular network, you might also need to bring copies of any recent test results. Also clarify if the physician wants to see the actual prescription pill bottles, or if a list of medications will be sufficient.
- **Medication & Symptom Logs:** It's important to keep a log of what medications are given, and when. Record any adverse effects or reactions on this document. It's also a good idea to track symptoms on a calendar each month. Update these documents each day to ensure you have accurate records to take with you to appointments.



- **Communicating With Healthcare Providers**

As we get older, building solid, trusting relationships with medical providers is more vital than ever. But it can feel tough to do. Communication isn't necessarily easy—the doctor may always seem to be in a hurry, and clinical jargon can be hard to understand.

Here are a few tips that can help.

- **Be Assertive, Not Aggressive:** One of the leading concerns about medical appointments is that people feel rushed. They may be left with many unanswered questions. Remind yourself that most physicians and providers truly want to deliver high-quality care to patients. Going in with an organized list will be helpful. So will adopting a tone that is insistent and assertive, but not aggressive. Don't give up or leave until your concerns are addressed.
- **Clarify Jargon & Medical Terms:** The healthcare industry is rife with jargon and clinical terms that can make it difficult to understand what healthcare workers are saying. If you find yourself getting confused, ask for clarification. And be sure to take good notes so you can follow up online, if needed, after each appointment.

- **Asking the Right Questions**

Being an informed caregiver and making educated decisions means asking good questions. Here are some tips to help you know what to ask.

- **Do Your Research:** Doing some research before and after you talk to physicians might be helpful in creating a list of questions. Credible websites from leading healthcare organizations often cover diagnoses in great detail. The same holds true for nonprofit organizations dedicated to specific diseases, such as the American Heart Association or the Alzheimer's Association.
- **Cover All the Bases:** Think of your loved one's condition and care in terms of these four aspects: diagnosis, medications, procedures, and discharge plans / aftercare. Create your list of questions based on each of these areas.

SECTION 2:

Planning & Organizing Daily Care

An organized, structured approach to caregiving can help ensure your loved one is getting good care, while also reducing your feelings of anxiety and stress. When you have systems in place to document key details, you won't have to rely on memory. The result can be greater peace of mind.

- **Daily-Care Planning Sheets**

Having the right tools is essential to staying organized and planning for the days and weeks ahead. These worksheets, which you can find in the Addendum, can help you keep track of daily caregiving tasks and medication schedules, as well as document key contact information in case of an emergency:

- Daily Caregiver Task Checklist
- Daily Dose Checklist

- **Emergency Contact Information Template**

Another indispensable part of planning for caregivers is knowing who to contact in case of an emergency. We've provided



an Emergency Contact Information Template in the Addendum, which you can use to record contact information and other key details for family members, caregivers, doctors, your preferred pharmacy and hospital/ER, and more.

- **Symptom-Monitoring Calendars**

You can also use calendar sites to create monthly symptom-monitoring worksheets. Websites like [Canva](#) and [Print a Calendar](#) might be helpful options to explore.

SECTION 3:

Managing Stress & Practicing Self-Care

Being a family caregiver can be rewarding. But it can also come with stress, guilt, and other difficult emotions. Taking good care of yourself is not just a luxury—it's a must. Remember, if you experience a health crisis of your own, you might find it a struggle to fulfill your caregiving responsibilities.

- **Identifying Early Signs of Caregiver Burnout**

While some signs of caregiver overwhelm—such as sadness or depression, back pain, or sleep problems—are obvious, others are vague. Common warning signs to be on the lookout for include experiencing anxiety, easily becoming angry or tearful, feeling guilty and frustrated, coming down with frequent colds, unintentionally gaining or losing weight, and skipping personal health appointments/screenings.

- **Implementing Stress Management Strategies for Caregivers**

Finding healthy ways to cope with the stress of caregiving is important. There are plenty of ways to reduce stress that don't take a lot of time. Meditate for 10 minutes each morning. Practice deep breathing several times a day. Incorporate a short Pilates or yoga routine into your afternoon or evening. Even journaling and crafting can help calm anxiety.

- **Creating a Realistic Self-Care Plan**

Another critical part of being a successful caregiver is practicing healthy self-care. That starts with setting up a self-care plan you can realistically stick with. While caring for your own emotional and physical well-being is essential, setting unrealistic goals can actually leave you feeling more overwhelmed and stressed. Try to pay special attention to getting quality sleep, eating a healthy diet, and exercising on most days of the week, even if it's only for 20 minutes a day.

SECTION 4:

The Emotional Side of Caregiving

Without a doubt, caregiving can be an emotional experience. Watching a loved one struggle with a chronic or life-limiting illness is difficult. Learning more about managing tough caregiving situations, from conflicts among family members to difficult emotions, is a must.

- **Navigating Emotional Triggers**

Caregiver guilt is often the toughest emotion to manage. It begins with recognizing that feeling guilty is a common and often unavoidable part of this role. The emotion usually stems from having unrealistic expectations and always feeling that you should be doing more. To overcome it, start by acknowledging your limitations as a human being and accepting that you can't do everything alone. Taking breaks or allowing others to help doesn't mean you're failing. Talk about your feelings with a trusted friend or in a support group.



- **Dealing With Family Conflict
Amid Caregiving**

Another struggle for many caregivers is the conflict that often arises between family members. Unfortunately, the primary caregiver is often the target of other family members' criticism and ire. Begin with clear, honest communication about roles, responsibilities, and expectations. It's important to set boundaries and ask others in the family for specific help, rather than assuming they understand your needs. When tensions rise, staying focused on the care recipient's well-being—not personal grievances—can help keep conversations productive and compassionate.

- **Coping With Isolation & Loneliness**

Finally, know that many caregivers find taking care of a loved one very isolating. It can lead to not only feelings of loneliness and sadness, but also even [more serious health risks](#), including depression, cardiac disease, and diabetes. That's why it's crucial to take time to stay connected with friends and loved ones every day, even if it is just through text messaging and social media. Video calls using Zoom or other platforms can also allow for face-to-face contact. And if you don't have anyone who can stay with your family member for a few hours so you can enjoy a weekend getaway, [explore respite care services](#) at local assisted living communities.



SECTION 5:

Resources & Support Systems

It's easy to overlook resources in your own community that provide support for caregivers. Most local areas have a variety of programs and services available.

- **Support Groups**

Caregivers often find that connecting with peers is a helpful way to manage stress and anxiety. It's also a good avenue for getting ideas and learning more about other nearby caregiver resources. You can usually find in-person support groups close to home. Check with your area office on aging for a list. If you prefer, online forums are another option. They allow you to network from the comfort of your favorite chair, at times convenient for you. Two online resources to explore are [Family Caregiver Alliance](#) and [Caregiver Action Network](#).

- **Community Resources**

Most cities and counties offer a variety of services and programs to support caregivers. Sometimes, it is just a matter of knowing where to look and who to speak with for help.

- **Adult Day Programs:** For caregivers who work or those who want to schedule regular breaks, adult day services can be an ideal solution. During the day, the senior goes to a care center that offers meals and activities. Many can even assist with medication administration, and some also offer transportation. Check with your local agency on aging, senior center, or primary care doctor to see what is available near you.
- **Respite Care Services:** When you need a break from caregiving, respite is another good option. These services are offered by home care agencies and senior living communities. You can relax and tend to your own needs, knowing your family member is being cared for by a team of professionals.

- **Transportation:** This is one of the areas that family caregivers struggle with the most, especially if they are employed outside the home. It can be difficult to take time off during the middle of a weekday to take a loved one to the dentist or doctor. Depending on where you live and what the appointment is for, there are likely options to explore. Healthcare systems often have vans available to take patients to and from appointments. For those receiving Medicaid, the Non-Emergency Medical Transportation (NEMT) program may be a solution. Some senior centers and agencies on aging also have volunteer drivers who can help. Finally, there are businesses like [GoGoGrandparent](#) that may be available in your area.

- **Care Apps & Tools**

Staying organized and keeping other family members in the loop is time-consuming and can feel overwhelming to a busy family caregiver. Fortunately, technology has made it easier and faster to accomplish those duties. Depending on your needs, a few apps and tools to investigate are:

- **CareZone:** This free app makes it easier to organize medication and health information. And you can share it with those you want to keep updated on your loved one's care.
- **Lotsa Helping Hands:** Think of this platform as a digital calendar on which you (or a helper) can post what a loved one needs. Friends and family can then sign up to help.
- **Caring Bridge:** This helpful platform allows you to communicate with everyone all at once, a big time-saver for caregivers. It also allows you to ask for help with specific tasks/appointments.
- **PA CareKit**
This resource is a collection of tools, information and support, including an "Understanding Your Needs" Quiz.



Conclusion

While caregiving can feel like a lonely road, you really aren't alone. Resources and tools are available to support you on this journey. It's important to give yourself permission to ask for and accept help without feeling guilty.

Schedule a Visit to a PSL Community

We invite you to call a Presbyterian Senior Living community near you to learn more and schedule a personal visit.

View Our Community List



PRESBYTERIAN
SENIOR LIVING

One Trinity Drive E., Suite 201
Dillsburg, PA 17019

717.502.8840

www.psl.org

Addendum – Daily Caregiver Task Checklist

Date: _____

Morning (AM) Tasks	Completed?
Check vital signs (BP, temp, etc.)	☐
Assist with toileting and hygiene	☐
Help with bathing/showering	☐
Assist with oral care (teeth, dentures, mouth)	☐
Check skin (pressure sores, rashes)	☐
Assist with dressing and grooming	☐
Prepare and serve breakfast	☐
Administer AM medications	☐
Help with mobility/stretching exercises	☐
Monitor fluid intake	☐
Track bowel/bladder movements	☐
Schedule/confirm appointments	☐
Other notes:	☐
Evening (PM) Tasks	Completed?
Prepare and serve dinner	☐
Administer PM medications	☐
Assist with toileting	☐
Check for signs of pain/discomfort	☐
Assist with evening hygiene (face, hands, oral care)	☐
Assist with changing into sleepwear	☐
Administer wound care (if applicable)	☐
Wind down with calm, relaxing activity (TV, music, reading)	☐
Review next day's schedule	☐
Complete final safety check (lights, locks, etc.)	☐
Monitor fluid intake	☐
Track bowel/bladder movements	☐
Ensure adequate sleep support (positioning, comfort)	☐
Other notes:	☐

Addendum – Daily Dose Checklist

Day:			
Time of Day	Medication	Taken	Notes
Morning			
Noon			
Afternoon			
Evening			
PM			
*Use the notes section to document refills needed, side effects and questions.			

Addendum – Emergency Contact Info

Patient

Full Name: _____

Date of Birth: ____ / ____ / ____

Address of Record: _____

Primary Diagnosis/Condition: _____

Allergies: _____

Primary Caregivers/Family Members

Full Name: _____

Phone Number: _____

Email Address: _____

Full Name: _____

Phone Number: _____

Email Address: _____

Full Name: _____

Phone Number: _____

Email Address: _____

Addendum – Emergency Contact Info

Primary Care Physician(s)

Physician Name: _____

Practice Name: _____

Address: _____

Phone Number: _____

Fax Number: _____

Email Address: _____

Physician Name: _____

Practice Name: _____

Address: _____

Phone Number: _____

Fax Number: _____

Email Address: _____

Specialists and Other Providers

Physician Name: _____

Practice Name: _____

Area(s) of Specialty: _____

Address: _____

Addendum – Emergency Contact Info

Phone Number: _____

Fax Number: _____

Email Address: _____

Physician Name: _____

Practice Name: _____

Area(s) of Specialty: _____

Address: _____

Phone Number: _____

Fax Number: _____

Email Address: _____

Physician Name: _____

Practice Name: _____

Area(s) of Specialty: _____

Address: _____

Phone Number: _____

Fax Number: _____

Email Address: _____

Addendum – Emergency Contact Info

Preferred Hospital/Emergency Room

Hospital Name: _____

Address: _____

Phone Number: _____

Pharmacy

Name: _____

Address: _____

Phone Number: _____

Fax Number: _____

Other Important Information:
