

Identifying Caregivers

This worksheet helps identify a patient's caregiving team and formalize support roles, with prompts to gather key details about household members, frequent visitors, and financial assistance needs, highlighting the importance of legal documentation if capacity loss is a concern.

How to use this worksheet

The questions/prompts below will help you identify the patient's caregiving team, including legal decision makers and/or the person(s) assisting with the most hands-on care. Questions/prompts are not all-inclusive but serve to facilitate conversation.

Question 1 [for caregivers]

I'm going to ask you some questions to help me get a better idea of who assists with [PATIENT NAME]. I would like to know if there is a partner, family member, friend, and/or neighbor who helps out. Sometimes there is one person who helps with care and sometimes there are many people.

Question 1 [for patients]

I'm going to ask you some questions to get a better idea of who assists you. Is there a partner, family member, friend, or neighbor who helps you? Sometimes one person provides support, and other times there are multiple people involved.



Caregiver Assessment

Does someone live with the patient? Yes No

If so, write in name, relationship, and contact information:

If the patient lives alone, how often does someone visit the home [if at all] and who visits regularly? Name, relationship, and contact information:

Informant/Supported Decision Maker

"Is there someone who comes to your medical appointments, helps provide information, or supports communication with your healthcare team?"

Medical Decision Maker

"Have you ever named someone to make medical decisions for you if you were too sick to do it yourself? This would be in an advance directive or durable power of attorney for health care."

Financial Decision Maker*

"Who would handle your bills if you were too sick? Have you named someone legally, like a durable power of attorney for finances or a representative payee?"

*If a patient needs help with managing finances but has not named someone in legal documents to provide that help, notify them they should do so. An advance directive or durable power of attorney does not give a caregiver the authority to manage patients' health insurance, benefits, money or property. Other documents are needed. If a patient is at risk of loss of capacity, this is an urgent care need. **A resource with information and help for you, your patient, and caregivers is: PlanforClarity.org**

ADL/IADL Assessment

Ask the caregiver or patient whether the patient receives assistance for any of the following activities. If 'yes', indicate who provides the assistance.

Assistance provided for ADLs

Dressing/grooming Yes

Bathing/toileting Yes

Transferring, (e.g. from bed to chair) Yes

Feeding oneself Yes

Ambulation Yes

Caregiver Name

Assistance provided for IADLs

Coordination of medical care (appointments) Yes

Medication (e.g. injections) Yes

Preparing meals Yes

Doing laundry/housework Yes

Shopping Yes

Communication (telephone, emails) Yes

Managing finances (paying bills) Yes

Caregiver Name