

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.

Your caregiving role is dependent on the needs of the person with dementia and your unique situation.

Use this checklist 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.

This will help you keep track of your progress.

▶ - Each flag has a number beside it to guide you to the specific resource in the resource link document. Use the QR code below to access the links:

Open the camera function on your cell phone or tablet.

Hold it over this QR code. Click on the yellow link that appears to access the document.



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 another person the control to make financial decisions on your behalf.

***Personal Directive** is a legal document that gives another person the control to make personal, non-financial decisions on your behalf.

***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. This process is completed with your Health Care Professional. 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 is in charge of 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.

EARLY-STAGE PLANNING

Education and Support	Who/When/Comments	✓
<p>▶^{1,2,3} Contact your local Alzheimer Society. Through the Alzheimer Society you can sign up for:</p> <ul style="list-style-type: none"> ● First Link® Connection session ● Seeds of Hope Learning Series 		
<p>▶⁴ Register for support groups.</p>		
<p>▶⁴ Consult 211 to identify the community resources available in your area. Create a list for yourself.</p>		
<p>▶⁵ Plan to talk or meet with other family members. Talk about who wants to do what. Share the plan for care and how to keep everyone informed.</p>		

Community Support	Who/When/Comments	✓
<p>Identify your support system and what they specifically can do to help.</p> <p>▶⁴ 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>Create a weekly or monthly schedule. This helps you plan activities and appointments for the person living with dementia. It is important to include time for yourself in the schedule.</p>		
<p>▶⁶ Make a safety plan for living in the community. This reduces risk of getting lost.</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	Who/When/Comments	✓
<p>▶⁷ Does the person living with dementia currently have a job? Support the person in talking with their employer about their diagnosis.</p>		
<p>▶⁸ For both care partner and person living with dementia: It is important to know about work policies. Illness or personal leaves may apply to your situation in the future.</p>		
<p>▶⁹ Ask questions about employer insurance plans regarding long-term disability and government programs.</p>		

Legal Issues	Who/When/Comments	✓
<p>Engage and support the person living with dementia in completing the following:</p>		
<p>▶¹⁰ Enduring Power of Attorney *(EPOA*) for property and finances are up-to-date and signed.</p>		
<p>▶¹¹ Personal Directive* is up-to-date and signed.</p>		
<p>▶¹² Legal Will* is updated and in place.</p>		
<p>▶¹³ If appropriate, have Advance Care Planning* discussion regarding wishes for care.</p>		
<p>Once completed and signed, keep these documents in a safe place. At this stage, your role is to support your person living with dementia to remain independent.</p> <p>When the time comes for enacting* the documents, you will do this in collaboration with your health care professional.</p>		

Finances	Who/When/Comments	✓
<p>▶¹⁰ Ensure Enduring Power of Attorney* (EPOA) is signed. Obtain a certified copy for the bank <i>only</i> when the document is enacted*.</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 the account is safe. <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 you are using.</p> <p><u>Consider changing the main contact information under the care partner's or designate's name with your person's consent.</u></p>		
<p>▶¹⁴ Register your person living with dementia on the National 'Do Not Call' list. This will reduce telemarketing calls.</p>		
<p>▶¹⁵ Apply for financial assistance programs.</p>		
<p>▶¹⁶ Check and use tax benefits.</p>		

Getting Organized	Who/When/Comments	✓
<p>▶¹⁷ Keep a record of all health information, including a list of medications. You can add it to the green sleeve* or a Capsule of Life[®]. Update it regularly and store it in an accessible place. On top of your fridge is a common suggested place.</p>		
<p>▶¹⁸ It can be difficult to understand everything the physician or nurse say during an appointment. Discuss with the person if they would be interested in Supported Decision Making*.</p>		
<p>▶¹⁹ 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>▶²⁰ Consider living arrangements. Start looking for outside help available in your area.</p>		

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

ALBERTA AND
NORTHWEST TERRITORIES

#306, 10430 - 61 AVENUE NW
EDMONTON, ALBERTA T6H 2J3
TEL: 1-866-950-5465 | FAX: 1-877-788-5993
WEBSITE: www.alzheimer.ab.ca | EMAIL: info@alzheimer.ab.ca
CHARITABLE REGISTRATION NUMBER: 12969-0343 RR0001