

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 below will help you identify the patient's caregiving team, including legal decision makers and the person(s) assisting with the most hands-on care. Questions 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? If yes, 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 health care 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](https://www.planforclarity.org)

ADL/IADL Assessment Table

Assistance Provided for ADLs	
Task	Caregiver Name
Dressing/grooming	
Bathing/toileting	
Transferring (bed to chair)	
Feeding oneself	
Ambulation	

Assistance Provided for IADLs	
Task	Caregiver Name
Coordination of medical care (appointments)	
Medication (injections)	
Preparing meals	
Doing laundry/housework	
Shopping	
Communication (telephone, emails)	
Managing Finances (paying bills)	