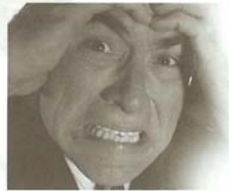



CAPSULE

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TIPS FOR GETTING ELDERCARE UNDER CONTROL

By Barbara E. Friesner



As an eldercaregiver, do you feel like you're playing "Whack-a-Mole" at a carnival but without the cool prize? Every time you get one issue under control, such as managing your aging loved one's finances, maintaining their home, dealing with their driving (or driving them), another one pops up? If so, you're not alone. Even after 25 years as a caregiver, some days I'm the one with the mallet – and some days I feel like the mole!

Because eldercare is often unexpected, intermittent (at least initially), and always unpredictable, few of us realize the time and toll it's taking on us personally in terms of money, relationships, and peace of mind – to mention nothing of our sanity! It's also difficult to accurately predict the true length of our commitment. In fact, according to the *1999 MetLife Mature Market Institute Study*, a majority of those anticipating 1 to 2 years of caregiving actually spent 4 or more years

providing care. Add to that all the complicated bureaucratic and legal restrictions, such as HIPAA, Medicare, insurance plan changes, and the paperwork that goes with it, it's not surprising we often find ourselves overwhelmed, exhausted, and just trying to cope.

The good news – and I can tell you this from personal experience – is that, regardless of where you are in your caregiving timeline, you *can*

save time and make your life easier and more manageable by putting systems in place for the long haul.

My generational coaching clients often say to me, "I have too much stuff going on – I don't have time to get organized!" However, when they start tracking the time they spend looking for and/or duplicating information, they are shocked at how much time and energy they're wasting – especially those who are a long-distance caregiver and/or sharing caregiving responsibilities with others.

But where to begin? Here are a few tips to get you started:

Tip #1 – SORT

Get lots of file folders (you can always return what you don't use). I prefer legal-size, 1- or 2-inch expandable/accordion file jackets so I don't have to worry about anything falling out the sides.

Label the files however makes sense to you. For example: legal, medical, insurance, home, car, Social Security/Medicare, bank, etc. Sort and file papers by topic (as above). Sort by current year, past year, and all previous years. Paper clip or put into individual file folders. Toss obvious garbage-like envelopes, but don't worry about serious purging in this initial sort.

If you stop at this point, you will have reduced your "searching" time substantially. Later as time and enthusiasm permits, go through each file and, *starting with the current year*, sort chronologically. Eventually you may want to put everything into chronological order, but that can wait. Check with your accountant about what to keep and for how long and throw out the rest. You can also find a good list of what to keep and for how long at MommysPlace.net (www.mommysplace.net/reduce_piles_paper.html).

Whether you use file jackets, color-coded files, or shoe boxes, the important thing to remember is that it doesn't have to be elaborate. Nor do you have to go for perfection. Try as I will to put everything into the right file immediately, I still have one labeled "Mom's Stuff To Be Filed" that I sort about once a month.

If your aging loved one is *willing* and able to help, by all means, work together. Pour a glass of wine, pop some popcorn, and put on music or a movie, and make an "event" of it. If you are working together, however, allow a lot more time or work over several sessions. Not only can this be an exhausting task for them, you'll also want to allow time for spontaneous reminiscing.

Tip #2 – COMPILE

While you're sorting, this is a perfect time to take stock of what information and vital documents you do – and *don't* – have.

Make a list of important providers (doctors, lawyer, accountant, stockbroker, etc.), accounts (insurance, bank, investment, etc.), and vital documents (Living Will, Health Care Proxy, Power of Attorney, original birth/death certificates, marriage license, Will, etc.)

You can use a sheet of paper or, for a complimentary copy of the AgeWiseLiving Legal & Financial Organizer which includes a list of vital documents, go to www.agewiseliving.com/newsletters.htm. As you locate the information, fill in the names, contact information, account numbers, etc. and fill in the location of the documents if they're kept elsewhere. If you're working with your aging loved one, this would be a good time to talk about the status of their Living Will, Health Care Proxy, etc.

Once the list is completed, make copies for your aging loved one and yourself (and other family members, if appropriate).

Tip #3 – COPY

While going with my mother from doctor to doctor, it always bothered me that, even those within the same group required us to fill out a medical history form. Finally, to save time and eliminate the aggravation of trying to remember the information, I compiled 3 sheets of frequently requested information:

Medical History

To keep the medical information up-to-date, ask to receive all test results, etc. in writing "for the file."

Current Medication

To keep the medication information up-to-date, if prescriptions come with an information sheet with a duplicate prescription bottle label,

put that into the file. If not, peel the label off the empty pill bottle, stick it on a piece of paper, and put that into the file.

Medical Insurance Information

Make half a dozen or so copies of the Medical History and Current Medication sheets and keep them in a file along with their medical insurance information. Bring the file to every doctor's appointment. Whenever the information is requested, write "see attached" and attach a copy.

With all of this, remember...simple is best and the time you invest now will save you enormously in time, money, relationships, and peace of mind in the future.

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