



WAYWISER

GET CONNECTED. STAY PROTECTED.

Waywiser's Caregiving SmartList, Version 1.2

not all inclusive-always evolving-updates at www.waywiser.life

→ BASIC IDENTIFICATION

When to use certified copy vs photocopy

- DOB, Place of Birth ([If unknown](#)) Additional resource: SEE GENEALOGY
- [Adoption Records](#)
- [Birth certificate \(generic guidance\)](#)
- [Death certificate \(Reporting Death Info\)](#)
- [Divorce/separation papers](#) Birth certificate
- [Marriage Certificate](#)
- [Citizenship papers](#)
- [ID](#)
- Insurance cards (health/[Medicare/assistance programs](#)/pharmaceutical/dental/eye care)
- Organ donation information/documents/instructions
- [Social Security Card \(Report Death\)](#) Additional Resource: SEE DEATH CERTIFICATE
- [Passport](#)
- [If Veteran: Veterans ID, DD214, annual letter of disability status, VA ID, VA listed emergency contact registered](#)

→ TRUSTED CIRCLE™

- ◆ Can be anyone with small tasks to large tasks. Think of the phrase the person or service "fills a need". Even if it is just calling your loved one once a week to chat, cutting their grass, walking their dog or feeding their cat. Those actions are providing care. Determine their responsibilities/contributions, their contact information (specifically email and phone) as well as their schedule for their responsibilities and if they are reliable.
- ◆ If you feel alone, look around, join a [support group](#), expand your [circle](#) and/or ask for help from associations, organizations, [friends](#), family or neighbors

→ MEDICAL

- [Medical History Report/Disputes of Report](#)

- Medication list, prescribers, pharmacy who fills each medication, refill instructions, lab work required on routine basis (*Tip: contact the pharmacy you find on pill bottles in your loved ones home, or suspect they use to determine if they pick up there*)
- [Routine check up appointments](#), medical condition related check ups needed with specialists
- Types of hardware in body for joint replacements or repairs
- Surgeries with dates and what done, Bonus Info: Physician who did surgery
- Medical conditions, Bonus Info: who diagnosed
- Contacts for vendors for medical equipment (oxygen, wound supplies)
- Allergies (medication, substances and/or food), Bonus Info: Allergy vs Sensitivity/Intolerance for each
- Immunization records and schedule for future vaccinations
- COVID card, if contracted COVID, dates of positive test and last day of symptoms for each time
- Know/collect CDC updated/current guidelines on isolation and quarantine for COVID to help with planning of care for your loved one
- Details of incidents/accidents/use of ER or other health services for accidents
- Notes on calls or messages from staff of senior living entity to report an event that is mandated to be reported: Who called, when and what they informed you of
- Living Will
- Advance Directive
- Do Not Resuscitate form
- Health Care or Durable Power of Attorney
- Mental Health Power of Attorney
- Body Donation to Science wishes/forms/contact information (If the donation institution requires additional storage prior to donation pickup, this is an extra and high cost. Some institutions allow for a pre-pay of this service. Contact Information for that funeral home or mortuary for body storage prior to donation)
- Meals, recipes, meal schedule, who will grocery shop, when will they shop, who will assist with leftover storage for each meal, who will stock and clean out refrigerator/freezer, special diets (appointments for, prescriptions, diet modification substances such as thickener, special consistency requirements, [adaptive utensils](#)); if they do not eat, how will you know, who needs to know, what will happen? (*Tip: [Make a list of easy to prepare meats, sides, desert, beverages that the person likes and can be interchanged with each other.](#) Make it a recurring menu with catchy titles such as Fish Fridays, Taco Tuesdays,*



Meatloaf Mondays, Wednesday Wild Card Meal or Tamale Thursday. This can help you and your loved one plan and know what to expect each day)

- [Food Delivery for help](#)
- Clergy name and contact information
- Funeral Home name and contact information/funeral plot or purchased services, written obituary
- Church or other spiritual or faith community name and contact information
- Preferred hospital name and contact information
- Service animals papers and registry information

→ **FINANCIAL**

• **Basic**

- [Redirect Mail/Cancel Mail](#)
- [Unclaimed Property Search](#)
- [Reporting Scams and Fraud](#)
- [Credit Report/Credit Freeze \(lifting a credit freeze\)/Errors on Report/Sample Dispute Letter for Errors on Credit Report](#)
- Bank account numbers
- Debit Card Pin
- Safe deposit box key: look for storage fees on accounts to determine if they had a Safe Deposit Box (may only be annual fee)
- Routing numbers for banks
- Titles and deeds
- Insurance policy details
- Deposit methods
- Homeowner's insurance coverage
- Home warranty coverage and claim process
- Employer insurances (worker's comp or liability)
- Flexible Spending Accounts, Health Services Accounts
- Debit Cards, Credit Cards, Gift Cards, Membership Cards (AAA, AARP)
- [Disputing Errors on Credit Cards](#)
- Forms required for insurance claims/payouts and instructions on how to file
- Will
- Financial or Durable Power of Attorney (recommended to sign an updated version about every 5 years or so) (if not in place you will need to seek [guardianship](#) or conservatorship in order to access accounts through the courts)
- [Guardianship papers](#) or Conservator papers
- Executor of Will



- Tax forms (any and all forms that are required to file for taxes), who will prepare and file, when it will be filed and where the debit or credit will deposit or deduct from
- [Filing Taxes After Death \(Do I need to file a Tax Return?\) \(Instructions\)](#)
- Previous year's tax returns [\(If deceased\)](#)
- People who may be financially impacted by your death/health issues and contact information
- [Caregiving Taxes/Tax Credits](#)
- [Reporting death to financial institutions](#)
- [Benefits and Insurance for People with Disabilities](#)
- **Assets**
 - Proof of income streams
 - Stocks
 - [Life Insurance](#)
 - Insurance policies
 - Wages
 - Tax return Payment
 - Family trusts
 - Social Security
 - Unemployment
 - Lawsuit Payment Recipient
 - Disability income
 - Retirement funds/[pensions \(Unclaimed Pension Lookup\)/Civil Service Retirement/Thrift Savings Plan/Military Credit Toward Civil Service Retirement/Is pension or annuity taxable?/Survivor of Federal Employee Retiree](#)
 - Family members/gifts
 - Rental properties
 - Liquidation of assets
 - Consignment stores/apps/Small business sales (Poshmark, Etsy)
 - Electronic money exchanges (Venmo/Zelle)
- **Liabilities** *(Tip: Always keep receipts for any expenditures on your loved one in one place)*
 - [Managing Debt/Counseling and Bankruptcy Filing](#)
 - Utilities (gas, water, trash, recycle, internet, sewer/waste water, cable, electricity, telephone, cell phone)
 - Daily life expenses (gas, food, clothing, toiletries, food preparation items/utensils, incontinence supplies, cleaning supplies, medications, first aid supplies)



- Mortgages, [Personal Property Taxes](#), payments on loans, insurance premiums, reverse mortgages ([Taking over Mortgage after death](#))/[Home Equity Lines of Credit](#)
- Other bills (and when they are due next)
- Credit card balances and limits
- Pending checks or wire transfers
- Debts owed on electronic money exchange platforms (Venmo/Zelle)
- Recurring bill pay/payments/scheduled transfers of funds to or from accounts
- Determine monthly budget for expenditures (document and record calculations as this will change and evolve through your caregiving journey)
- Property Taxes (paid through Mortgage or separate)

→ **LIVING ACCOMODATIONS**

- House cleaning needs, who does it and when, cleaning supplies, cleaning tools (Tip: Break cleaning up into one room a day or every other day to help make it a smaller task to complete, put it on a calendar)
- Survey of property
- Listing/selling contracts/disclosures

- **Seasonal preparation**

- Clothing
- HVAC
- Outdoor faucets
- Plants
- Pets
- Sprinkler systems
- Pools/hot tubs
- Vehicles/other personal property
- Vacant houses owned
- Snow removal plans
- Back up electricity plans/generator gas/diesel fill ups
- Hurricane and other disaster preparedness
- Vaccinations (flu shot)

- **Home Maintenance**

- HVAC systems
- HVAC filter changes
- Smoke alarm/CO2 detector battery replacement
- Security alarm codes/battery replacement, update numbers
- Flashlight battery replacement
- Emergency kits, location of and contents (some expire)



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- Water filtration systems and salt additions
- Refrigerator filter changes
- Yard sprinkler system checks and schedules, monitoring for leaks, some states/counties require inspections on a certain schedule, adjustment requirements from state/city/county during droughts
- Cleaning out refrigerator and freezer of rotten/bad items routinely
- Toilets
- Light bulb changes
- Dryer vent cleanings
- Chimney sweepings
- Leaf collection
- Cutting back trees off house to prevent pests
- Pest control
- Cutting grass/other lawn maintenance
- Pool maintenance
- Hot tub maintenance
- Deck/fence painting/staining
- Cleaning gutters
- Vehicle safety checks (tires, oil, wiper fluid, antifreeze, wiper replacement, AC filters, documents from any accidents in vehicle, registration documents, inspection documents, insurance proof, first aid kit contents refilled/up to date, spare tire, lug lock keys if needed), toll payment system balances, debts or contact information to renew/refill
- Window cleaning (to prevent someone from using ladders proactively)
- Oven cleaning
- Cleaning up dog poop in yard if pet, litter box changes, cage or tank changes, vet appointments, proof of vaccinations, registrations or licenses, pet supplies, food, medications, hair management, beds, leash, collar, tags, nail cutters, emergency placement if loved one is hospitalized in middle of night/suddenly/extended period of time
- Home Safety Checklist/Inspection with plans for any needed modifications
- Indoor plant care
- Keys to property items (houses, cars, boats, lawnmowers, locks, safes, guns, chests, china cabinets, closets)



- Medical device repair/safety/calibration (scales for those with CHF, blood pressure cuffs for those with high blood pressure), contacts for such needed repairs/maintenance
- Contracts or rental agreements from senior living communities or services
- Job descriptions and/or policies determined for hired caregivers/service technicians/handyman
- Transportation to appointments, who will transport, when do they need it, how will they physically accomplish the transport, who coordinates it all, who tracks that it happens to and from event, public transportation costs/cards/tokens
- Safe driving assessment, reporting requirements, updates to licensing entity or physician, copies of medical documents needed to renew license if need be

→ INTELLECTUAL PROPERTY

- Websites for records (health/financial/tax/business operations, stocks), memberships, accounts, email, calendars, contacts/address books)
- Logins and passwords to all of the above
- Computer login/password
- Password to cell phone
- Access to any purchased Cloud storage

→ SENTIMENTAL ITEMS (may want to inventory with loved one)

- Jewelry/appraisals and insurance policies covering of such
- Family photos (where are they stored, if electronic, account information)
- Books
- Videos (where are they stored, if electronic, account information)
- Coins/other collections (value estimations, insurance policies)
- Paintings/art (insurance policies, appraisals, receipts of sale, artist information)
- Furniture (insurance policies, appraisals, receipts of sale, manufacturing information)
- [Genealogy documents/files](#)

→ FUTURE PLANNING

- [Voting locations and if registered for home \(or new home if in senior living\), voter registration cards](#)
- Application for absentee voting
- Needs assessment to determine where the individual will be and what they might need assistance within one, two or ten years to plan for the above information and decision making (Waywiser's Caregiving Guide as Interactive Planning Tool, www.waywiser.life)



