Sharon Toth is caregiver for her husband, Larry, who has Parkinson's disease. She keeps a list of all her husband's medications and maintains a calendar of doctors' and physical therapy appointments and dates when medications can be refilled.

For caregivers already exhausted from the demands of their duties, devising an organizational system can be a godsend.

"How do you coordinate the vast amount of information in that caregiving role?" said Sandy Markwood, chief executive of the National Association of Area Agencies on Aging. "How do you keep track of all of the physicians? How do you keep track of all of the medications? How do you keep track of all things like advance directives? How do you keep track all of the difference insurance policies?"

"There are so many buckets of information a caregiver needs to have access to. In some cases, depending on the condition of their loved one."

Pulling it all together in an organized fashion will alleviate some of the stress by making it easier to find important documents and other information.

There are several key areas that caregivers need to focus on when it comes to organizing their loved one's matters, said Markwood.
“In my case and so many others, there seem to be three buckets of organizational information that caregivers need to organize — health, financial and legal — and then two buckets of organizational supports that are needed — support for your loved one and then support for you as a caregiver,” she said.

**Health bucket**

Make a list of your loved one’s doctors, medications, medical history, Medicare, other health insurance cards and a list of emergency contacts.

If your loved one has long-term care insurance, get a paper copy of the policy.

“Have a file with information and instructions so that someone else can step in and take over if you, the caregiver, become sick or unable to manage things,” said Lue Taff, geriatric care manager at the Senior Source in Dallas.

With medications, make sure you list the doses, who prescribed them, the times for the medication and the pharmacy.

Sharon Toth of Rockwall is caregiver for her husband, Larry, who has Parkinson’s disease. She keeps a list of all her husband’s medications and maintains a calendar of all doctors’ and physical therapy appointments and dates when medications can be refilled.

Toth, 73, also has designated pill containers, one for each day, because her husband takes medicine every three hours from 7 a.m. to 11 p.m.

“Parkinson’s patients freeze up and can’t walk or lose their balance if they don’t have their medication,” she said.

Toth said it’s critical that caregivers create an organizational system that works for them.

“You’re taking care of someone, and everything ends up on you,” she said. “I keep a loose-leaf folder with the plastic pages, and I slide everything into that. I do keep track of the doctors’ names and numbers so that if anyone needed to take over in my absence, they would have that.”

She also made sure her three children know where the book is and what it contains.

In addition to her folder, Toth also uses a bulletin board to post the business cards of doctors and pharmacies.

“It all needs to be in one spot,” she said.

**Financial records**

The financial information you need to collect should include your loved one’s:

- Birth certificate.
- Mortgage/rental documents.
- Bills.
Bank records.

Passwords for online accounts.

Contact information for financial advisers.

**Legal papers**

You also should have copies of your loved one’s:

Will.

Financial power of attorney.

Medical power of attorney.

Living will.

**Caregiving plan**

Assessing your loved one’s unmet needs and how their care can be improved will allow you to develop a thorough caregiving plan.

“To complete the caregiving plan, list everyone — including yourself — who is providing support, their broad or specific responsibilities, specific tasks and timelines for accomplishment,” said Amy Goyer, family issues expert at AARP and caregiver for her parents. “Share a copy with everyone on the team so all can understand their unique roles and how everyone is working together.

“You’ll also be able to see how balanced the plan is in terms of how your loved one’s needs are met and each person’s load.”

Goyer’s sisters are part of her parents’ caregiving team.

“I have my sisters on that list so that when I add a task to that list, they get an email and it says, ‘There’s a new list on Mom and Dad,’ and they can look at that and see if there’s something that they can help with,” Goyer said.

The best organizational system is the one that works for you. What’s important is that you start now, before a crisis hits.

“Most of us have experienced the frantic search for a critical legal, health or financial document, often under heavy pressure due to a crisis or time crunch,” Goyer said. “Start now to gather the information and documents and organize them for easy access.”

Once they’re organized, you’ll be able to find what you need easily, whether it’s in the midst of a crisis or not.

“You can’t control a lot of what happens to your loved ones in the course of caregiving,” Goyer said. “But this is one place where you can be proactive, and that’s worth the effort.”