

Using the Elder Organizer

The COVID-19 pandemic has created immense challenges for seniors and their loved ones. To help supplement the services that seniors are provided, Foster Swift has created the **Elder Organizer** toolkit. This free downloadable tool can be used as a digital notebook to help caretakers organize appointments, medications, and other critical information.

All of the documents are available in Google Sheets, Excel, and as PDFs, so that you can select the format that works best for you. Google Sheets is also accessible across all smartphones and online channels so information can be added, updated, and shared instantly.

Our Foster Swift family has used these templates personally. We know caring for an aging loved one or for someone with rehabilitation needs can take a toll on those who care for them. We hope the **Elder Organizer** gives you an extra layer of support.



Private Care Schedule + Reports

Care Schedule: There are often many people involved in caring for seniors. This weekly scheduling document is setup in 30 minute increments so that you can track when caregivers are present. This is often helpful for payroll and planning purposes. Simply enter a person's name into the corresponding blocks of time for the time period worked. You can also include contact information for easy communication.

Incident Reports: In the tab next to the care schedule, there is a spreadsheet to keep track of any incidents that may need to be shared between caregivers. This document allows you to share notes including the date, time, caregiver name, and incident details. This serves to help monitor trends and issues, and even see patterns of behavior, such as if your elder person struggles at certain times of the day or night.

Appointments + Medication Schedule

Appointments: The medical appointment tab helps you to easily track important information needed during physician visits. It separates information into date, time, physician name, contact information, purpose, follow up, and notes. We recommend limiting the sharing of this document, as well as the medicine tracker, to key healthcare professionals and the person who has Medical Power of Attorney.

Medications: It is important to keep medication organized and carefully tracked. This medication spreadsheet helps take the headache out of managing medication, with columns for the drug name, prescribing physician, date prescribed, frequency, duration of medication, and medication notes. This clear and efficient list will be invaluable during caregiver transitions.

Visitor Log + Photos + Shared Media

Visitor Log: The visitor log is a document that you will likely want to share with everyone. It's helpful for families to look at who visited and when, and use this information as conversation points with the elderly person. Discussing who visited draws out conversation, helps boost memory, and serves as a framework for conversation. It's also an important check on visitors like physical therapists.

Photos and Media: Photos are a priceless way of bringing joy to you and your loved ones during what is often an incredibly difficult time of caring for an aging senior. This document allows everyone to share their special memories, even as they are made. You can save photos directly to the document, or link to video files or other shared media.

The Elder Organizer and additional resources can be found on Foster Swift's Elder Law blog at mielderlawblog.com.