



# **FAMILY CAREGIVERS TOOLKIT**

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This toolkit provides practical guidance, checklists, planning tools, and emotional support to help you balance caregiving with everyday life — whether you're new to caregiving or have been supporting a loved one for years.

## SUPPORTING EMPLOYEES WHO CARE FOR THEIR LOVED ONES

Balancing the demands of work and family caregiving can be both deeply meaningful and incredibly challenging. Many employees find themselves caring for an aging parent, an ill partner, a child with special needs, or another loved one—often while managing full-time professional responsibilities.

The Family Caregivers Toolkit was created to support you as you navigate this important role. It's designed to provide practical tools, expert tips, and emotional support to help you care for your loved one while also caring for yourself.

### Inside, you'll find resources to help you:

- Organize care responsibilities and access community support.
- Communicate effectively with healthcare providers, family members, and your workplace.
- Manage stress, prevent burnout, and prioritize your own well-being.
- Connect with Employee Assistance Program (EAP) services, including counseling, coaching, and work-life resources.

Whether you're just beginning your caregiving journey or have been supporting a loved one for years, this toolkit is here to remind you that you are not alone—and that help is available every step of the way.



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resources—anytime, anywhere. Just  
scan the QR code to get started.



## TIPSHEET: BECOMING A FAMILY CAREGIVER



Caring for someone you love is one of the most meaningful acts of compassion — but it can also be one of the most demanding.

Whether you've recently stepped into the role or have been helping a loved one for some time, understanding what it means to be a caregiver can help you navigate this journey with more confidence and less stress.

### 1. Understanding the Role

A family caregiver is anyone who provides unpaid assistance to a loved one who is ill, aging, or has a disability. Caregiving may involve:

- Helping with daily living activities such as meals, hygiene, and mobility.
- Managing appointments, prescriptions, and health records.
- Coordinating care with doctors, specialists, or home health aides.
- Offering emotional companionship and reassurance.

Recognize that caregiving looks different for everyone — it can range from occasional check-ins to 24-hour support.

## 2. Establishing a Plan

Before caregiving begins to feel overwhelming, start by creating a simple plan:

- Assess needs: What type of help does your loved one require daily, weekly, or occasionally?
- Identify your team: Include family, friends, neighbors, and professional caregivers who can share responsibilities.
- Set boundaries: Know what you can reasonably take on without sacrificing your own health or job stability.
- Stay flexible: Care needs evolve — review and adjust the plan often.

## 3. Building Communication and Support

Clear communication is key.

- Hold family meetings to align expectations.
- Maintain a list of contacts for doctors, insurance, and emergency services.
- Let your employer know you are a caregiver — you may qualify for flexible scheduling or leave benefits under the Family and Medical Leave Act (FMLA).

## 4. Managing Stress and Emotions

It's normal to feel guilt, exhaustion, or frustration. You are human.

- Take regular breaks — even short ones.
- Accept offers of help from others.
- Use stress-reduction practices such as journaling, exercise, or mindfulness.
- Connect with your Employee Assistance Program (EAP) for counseling, coaching, and emotional support.

## 5. Knowing When to Ask for Help

When you notice signs of burnout — irritability, sleep changes, or feeling detached — it's time to reach out.

Support groups, professional care coordinators, or your EAP can help lighten your load and provide perspective.

**Remember: You don't have to do it all alone. Caregiving is not just a personal role — it's a community effort.**



# TIPSHEET: BECOMING A FAMILY CAREGIVER

Balancing a career and caregiving is a challenge faced by millions of employees. Whether you're supporting an aging parent, a partner recovering from illness, or a child with special needs, the competing demands of work and care can feel overwhelming. Yet, with thoughtful planning and the right support, you can meet your professional responsibilities while caring for your loved one — and yourself.

## 1. Open Communication at Work

Start by having an honest, proactive conversation with your manager or HR representative. Explain your caregiving role and the potential need for flexibility — such as adjusted hours, remote work, or compressed schedules. Most organizations want to retain valuable employees and are open to collaborative solutions.

Also, familiarize yourself with workplace policies and federal protections such as:

- The Family and Medical Leave Act (FMLA): Allows eligible employees up to 12 weeks of unpaid, job-protected leave to care for a family member.
- Flexible Work Arrangements: Many companies now offer hybrid options or time-off banks that can accommodate caregiving needs.

Clear communication reduces stress and prevents misunderstandings. Framing your discussion around maintaining productivity (e.g., "Here's how I can continue meeting my goals...") shows commitment and professionalism.

## 2. Structure Your Time and Energy

When you're balancing two major responsibilities, efficiency is everything.

- Plan weekly: Map out both work deadlines and caregiving tasks. Use color-coded calendars or shared apps like Google Calendar or Cozi.
- Prioritize tasks: Focus on what truly needs your attention each day — and delegate when possible.
- Batch similar activities: Group emails, phone calls, and errands to minimize distractions.
- Use your peak energy times: Schedule demanding work tasks for when you're most focused, and caregiving tasks when you're alert but flexible.

It's also wise to have a backup plan — someone who can step in if an emergency arises during work hours. Identify coworkers or family members who can help when you can't be present.

### 3. Set Boundaries and Protect Your Energy

Boundaries are essential to prevent burnout.

- Avoid taking work calls during caregiving hours unless absolutely necessary.
- Don't feel guilty about saying "no" to extra commitments.
- Block personal time on your calendar — even 15 minutes for quiet or exercise counts.

Remember, rest is not indulgence — it's essential maintenance. Exhaustion benefits no one, least of all your loved one or your employer.

### 4. Leverage Available Support Systems

You don't have to manage everything alone. Tap into:

- Employee Assistance Program (EAP): For confidential counseling, caregiver coaching, and referrals to eldercare or home-care services.
- Support groups: Online or in-person caregiver groups provide emotional relief and practical advice.
- Technology: Tools like medication reminder apps or delivery services can reduce your daily mental load.

If your company offers mental health days, take them when needed. Regular rest helps sustain both your career and caregiving efforts over time.

### 5. Redefine Success

It's easy to feel like you're not doing enough — at home or at work. But caregiving often requires redefining what success looks like.

Instead of perfection, aim for progress and balance.

Celebrate small victories: a productive day at work, a good medical appointment, or simply moments of calm with your loved one.

**Remember: You are doing two very important jobs. By setting realistic expectations and using your support systems, you can thrive in both your work and caregiving roles.**



## TIPSHEET: BECOMING A FAMILY CAREGIVER



Being a caregiver often means stepping into the role of advocate and decision-maker.

Having the right legal documents in place ensures your loved one's wishes are respected and protects you from potential legal or financial complications.

### **1. Power of Attorney (POA)**

A Power of Attorney allows your loved one to designate someone (often you) to make decisions on their behalf if they're unable to.

- Financial POA grants access to manage money, bills, and property.
- Durable POA remains in effect even if your loved one becomes incapacitated.
- Make sure this document is signed and notarized according to state law.

### **2. Healthcare Proxy or Medical Power of Attorney**

This document authorizes you to make medical decisions if your loved one is unable to speak for themselves.

Keep a copy in your loved one's medical file and give one to their healthcare providers.

### **3. Advance Directive (Living Will)**

An Advance Directive spells out the individual's preferences for medical treatments, such as life support, resuscitation, or comfort care.

Having this document reduces confusion and family conflict during emergencies.

### **4. HIPAA Release of Information**

Without a HIPAA release, healthcare providers legally cannot share information with you. This form allows you to access medical records, discuss care plans, and advocate effectively for your loved one.

### **5. Will or Estate Plan**

Encouraging your loved one to create or update a will ensures their wishes are honored after death.

An estate plan may also include trusts, asset distribution, and end-of-life directives.

### **6. Guardianship or Conservatorship (if needed)**

If your loved one can no longer make decisions and lacks the proper documents, you may need to petition the court for guardianship.

Consult an elder-law attorney or use your EAP's legal referral service for guidance.

### **7. Emergency and Contact Information**

Maintain an updated folder with:

- Doctor and pharmacy contacts
- Insurance cards and policy numbers
- Emergency contacts and backup caregivers
- Copies of all legal documents

**Tip: Keep originals in a fire-safe box and digital copies stored securely.**

**Review all documents every year or after major health or family changes.**



# THE EMOTIONAL ROLLERCOASTER OF CAREGIVING



Caregiving is an act of love — but it can also stir up a wide range of emotions. Many caregivers describe feeling both rewarded and drained, sometimes in the same day. Understanding these emotional ups and downs can help you navigate caregiving with greater self-awareness and compassion.

## 1. Common Emotional Experiences

- Guilt: Feeling you're not doing enough or that you should feel more patient or grateful.
- Frustration or resentment: When responsibilities pile up or other family members aren't helping.
- Grief: Mourning the gradual loss of who your loved one once was — even as they're still with you.
- Anxiety: Worrying about finances, health crises, or the future.
- Isolation: Feeling like no one understands what you're going through.

These feelings are not signs of failure — they're normal reactions to a demanding and deeply emotional role.

## **2. Recognizing Signs of Burnout**

Over time, constant stress can lead to caregiver burnout — a state of emotional and physical exhaustion. Warning signs include:

- Feeling numb or detached from your loved one.
- Trouble sleeping, concentrating, or enjoying activities you once liked.
- Frequent illness or chronic fatigue.
- Feeling hopeless or easily irritable.

If you recognize these signs, it's time to reach out for support — not push harder. Burnout doesn't mean you're weak; it means you've been strong for too long without enough help.

## **3. Healthy Coping Strategies**

- Acknowledge your feelings. Suppressing them can lead to resentment or depression.
- Give yourself permission to rest. Even short breaks matter — a walk, quiet music, or deep breathing can reset your energy.
- Stay connected. Talk to a friend, join a caregiver group, or share your story in a safe space.
- Seek perspective. Counseling through your EAP can help you process guilt, grief, or anger in a healthy way.
- Celebrate meaning. Reflect on the positive moments — laughter, gratitude, or a simple connection with your loved one.

## **4. Supporting Your Emotional Health Daily**

Try building small habits that nurture your mental and emotional balance:

- Keep a gratitude journal — jot down one thing that went well each day.
- Practice mindfulness or meditation for five minutes in the morning or before bed.
- Schedule "you time" in your calendar, just as you would a doctor's appointment.
- Accept help — when someone offers to cook, run errands, or sit with your loved one, say yes.

## **5. When to Reach Out for Professional Support**

If you find yourself crying frequently, feeling hopeless, or struggling to function at work or home, it's time to talk to someone.

Your Employee Assistance Program provides free, confidential counseling for emotional distress, grief, and burnout. You can also receive referrals for ongoing therapy or local caregiver support networks.



# TIPSHEET: CREATING A SAFE AND SUPPORTIVE HOME ENVIRONMENT



A comfortable, accessible home can make caregiving easier — and help your loved one maintain independence and dignity.

## 1. Safety First: Preventing Falls and Accidents

Falls are a leading cause of injury for older adults and people with mobility issues. Simple, low-cost adjustments can greatly reduce risks:

- Remove clutter, cords, and throw rugs from walkways.
- Install grab bars in bathrooms and sturdy railings on stairs.
- Improve lighting in hallways, entryways, and outdoor steps.
- Keep floors dry and use non-slip mats.
- Ensure smoke and carbon monoxide detectors are functional.

**Pro tip: Have a professional home safety assessment through local aging services or your EAP's eldercare partner.**

## 2. Designing for Accessibility

If your loved one has limited mobility or vision:

- Keep frequently used items (medications, phones, utensils) within easy reach.
- Rearrange furniture for wider, obstacle-free paths.
- Consider raised toilet seats, shower chairs, or ramps.
- Use color contrast for edges of steps and doorframes to improve visibility.
- Ensure door handles and faucets are easy to turn or replace knobs with levers.

## 3. Supporting Emotional Well-Being

A safe home also nurtures emotional security.

- Create a calm, familiar environment with meaningful photos or artwork.
- Maintain consistent routines — regular mealtimes, bedtime, and social interaction.
- Provide access to natural light and fresh air whenever possible.
- Play soft music or soothing sounds for relaxation.

## 4. Technology That Helps

Modern tools can reduce stress for both you and your loved one:

- Smart home assistants (voice-activated lights or reminders).
- Medical alert systems and wearable devices.
- Video calling or monitoring for remote check-ins.
- Medication reminder apps and automatic pill dispensers.

## 5. Caring for Yourself in the Home

If you live with the person you care for, create a space that is yours.

A quiet corner for reading, meditation, or calls with friends can help you recharge. Keep your own routines for exercise, nutrition, and rest — your well-being directly impacts your ability to provide care.

**Remember: A supportive home benefits everyone — it protects your loved one's safety and your peace of mind.**



# TALKING TO TREATMENT PROVIDERS CHECKLIST



Navigating medical appointments can feel overwhelming, especially when you're trying to absorb complex information, make decisions, and advocate for your loved one — often all at once. Having a checklist can help you stay focused, ensure that no key question goes unanswered, and give you confidence that you're making informed choices.

Bring this guide to every appointment and take notes or record responses (with the provider's permission) for easy reference later.

## **Before the Visit**

Prepare in advance so you can use your time effectively.

- What new symptoms or changes should we report?
- What medications, test results, or recent health updates should we bring?
- What are the main questions or concerns we want to address today?
- Who will attend the appointment (caregiver, family member, translator, etc.)?
- Is there any paperwork to complete before arriving?

## During the Visit

Stay organized, take notes, and ask for clarification whenever needed.

- What is the current diagnosis or update on the condition?
- What caused this issue, and how serious is it?
- What treatment options are available, and what are their pros and cons?
- Are there side effects, warning signs, or symptoms we should watch for?
- What lifestyle changes (diet, exercise, routines) might help?
- What medications are being prescribed, and how should they be taken?
- How will we know if the treatment is working?
- Are there any alternative or complementary therapies to consider?
- What specialists or services might be helpful?
- Who should we contact if questions arise between visits?

## After the Visit

Before leaving the office, double-check that you understand the next steps.

- When should the next appointment or test be scheduled?
- What paperwork, referrals, or prescriptions do we need to take home?
- Are follow-up lab results or imaging reports expected — and how will we receive them?
- Who should we contact if symptoms worsen or new concerns appear?
- Can we receive written instructions or a visit summary for our records?

## Caregiver Self-Assessment Quiz: “How Are You Coping?”

Instructions: For each statement, rate how often it feels true (1 = Never, 5 = Always).

Statements:

|                                                         | 1                        | 2                        | 3                        | 4                        | 5                        |
|---------------------------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| • I feel overwhelmed by my caregiving responsibilities. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • I have time to rest and recharge each week.           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • I feel supported by friends, family, or colleagues.   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • I can ask for help when I need it.                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • I experience guilt when I take time for myself.       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

## Scoring:

- Mostly 1–2: You may be at risk of caregiver burnout — reach out to your EAP or a support group.
- Mostly 3: You’re coping, but balance could improve. Identify one small self-care change to try this week.
- Mostly 4–5: You’re managing well — maintain your support systems and keep prioritizing self-care.





# WEEKLY CARE PLANNER

Use this planner to organize your caregiving week. Track appointments, meals, and self-care activities to maintain balance and structure. Try to include at least one self-care activity for yourself each week.

| Day       | Appointments / Tasks | Meals / Nutrition | Self-Care / Breaks | Notes |
|-----------|----------------------|-------------------|--------------------|-------|
| Monday    |                      |                   |                    |       |
| Tuesday   |                      |                   |                    |       |
| Wednesday |                      |                   |                    |       |
| Thursday  |                      |                   |                    |       |
| Friday    |                      |                   |                    |       |
| Saturday  |                      |                   |                    |       |
| Sunday    |                      |                   |                    |       |

**Tip: Include one thing each week that’s just for you — even a short break can help restore balance.**



# NATIONAL AND LOCAL CAREGIVER SUPPORT ORGANIZATIONS DIRECTORY

Caring for a loved one can be rewarding — but it can also feel isolating and exhausting. Thankfully, there are trusted organizations, online platforms, and local resources that provide education, emotional support, respite options, and financial guidance for caregivers.

This directory highlights reliable places to turn for information, community, and assistance at any stage of the caregiving journey.

## **National Caregiving Resources**

Family Caregiver Alliance (FCA)

[www.caregiver.org](http://www.caregiver.org)

Offers comprehensive resources on caregiving challenges, legal and financial issues, and condition-specific support. The FCA also operates the Caregiver Online Resource Center and provides free webinars.

## **AARP Family Caregiving**

[www.aarp.org/caregiving](http://www.aarp.org/caregiving)

Provides guides, checklists, and financial planning tools for caregivers of aging parents and loved ones. Includes state-by-state caregiver law information and a supportive online community.

## **National Alliance for Caregiving (NAC)**

[www.caregiving.org](http://www.caregiving.org)

Advocates for caregivers through research, public policy, and leadership. Offers reports and toolkits for working caregivers and families managing long-term care.

## **Eldercare Locator (U.S. Administration for Community Living)**

[eldercare.acl.gov](http://eldercare.acl.gov)

A free national service that connects caregivers to local support — including home care agencies, transportation, legal aid, and meal services. Available by phone at 1-800-677-1116.

## **Alzheimer's Association**

[www.alz.org](http://www.alz.org) | 24/7 Helpline: 1-800-272-3900

Provides information, education, and a 24-hour support line for caregivers of individuals living with Alzheimer's disease or other dementias.

## **ARCH National Respite Network and Resource Center**

[www.archrespite.org](http://www.archrespite.org)

Helps families locate local respite care services and provides training for both caregivers and professionals.



# ONLINE AND PEER SUPPORT NETWORKS



## **Caregiver Action Network (CAN)**

[www.caregiveraction.org](http://www.caregiveraction.org)

A nonprofit providing free education, peer support forums, and a “Caregiver Help Desk” for real-time advice via phone or chat.

## **CaringBridge**

[www.caringbridge.org](http://www.caringbridge.org)

A secure online platform for caregivers to share updates, coordinate help, and stay connected with friends and family.

## **LotsA Helping Hands**

[www.lotsahelpinghands.com](http://www.lotsahelpinghands.com)

An online coordination tool that helps families create private caregiving communities for meal delivery, transportation, and check-ins.

## **The Mighty**

[www.themighty.com](http://www.themighty.com)

An online health community where caregivers and individuals living with chronic illness share stories, coping strategies, and emotional support.

## **Financial, Legal, and Practical Assistance**

### **BenefitsCheckUp (National Council on Aging)**

[www.benefitscheckup.org](http://www.benefitscheckup.org)

Free online tool that helps older adults and caregivers find benefit programs that help pay for food, medicine, utilities, and health care.

### **Social Security Administration (SSA) Caregiver Resources**

[www.ssa.gov/caregivers](http://www.ssa.gov/caregivers)

Information about disability benefits, survivor benefits, and how to manage Social Security for a loved one.

### **Medicare.gov**

[www.medicare.gov](http://www.medicare.gov)

Official U.S. government site for Medicare coverage, provider searches, and caregiving resources.

### **National Council on Aging (NCOA)**

[www.ncoa.org](http://www.ncoa.org)

Provides financial literacy, chronic disease management, and senior wellness programs for caregivers and older adults.

## LOCAL SUPPORT AND COMMUNITY SERVICES

### Area Agencies on Aging (AAA)

Find your local agency via [www.n4a.org](http://www.n4a.org) or through the Eldercare Locator.

These agencies connect caregivers with adult day programs, respite care, transportation, meals, and senior centers.

### Faith-Based and Community Programs

Many local churches, synagogues, mosques, and community centers run caregiver support ministries, meal delivery programs, and volunteer respite services.

### Hospitals and Clinics

Ask your loved one's healthcare provider or hospital social worker about care coordination teams or local support groups for specific diagnoses (e.g., cancer, heart disease, stroke recovery).

### Crisis and 24/7 Support Lines

- 988 Suicide and Crisis Lifeline: Call or text 988 for immediate emotional support.
- National Alliance on Mental Illness (NAMI) Helpline: 1-800-950-NAMI (6264) or [www.nami.org/help](http://www.nami.org/help).
- SAMHSA Treatment Referral Helpline: 1-800-662-HELP (4357) — free, confidential support for mental health and substance use concerns.
- Veterans Crisis Line: Dial 988, then press 1.

Remember: You don't have to face caregiving alone. Reaching out for help — whether for information, community, or emotional relief — is a sign of strength, not weakness. The right resources can make caregiving more sustainable, safe, and fulfilling for both you and your loved one.

**Bree Health benefits are available to you and your family members 24/7/365.  
Just call 1-800-327-2255.**