



Checklist for a Successful Care Experience

It can be worrisome as a caregiver to bring in outside help for a loved one. It is important to prepare for this situation and work with a provider that has an excellent reputation and makes specific efforts to ensure a smooth care transition.

- Find out how an agency handles hiring, supervision and training of staff. How does the agency screen/what qualities do they look for in hiring? Do they offer orientation and ongoing training? Do they pay employees to attend training? How do they review an employee's quality care?
- Plan to meet caregivers on the initial visit when possible to get to know each other, answer any questions and help with orientation.
- Find out how a company documents and communicates information. Do they use a system to ensure communication between caregivers? How do they share the [care plan](#)? How do they communicate to you? Do they use a family portal that allows you to view notes and information about care and how your loved one is doing?
- Put together information on your loved one's [daily routine](#). Routine is essential, especially if your loved one has memory issues. Don't forget the little things! Does your loved one prefer a certain snack every day? What time does he/she usually wake up, take a bath, and eat meals? Does the care provider ask these types of questions and how do they communicate this information to caregivers?
- Organize your loved one's important health and contact information (list of diagnoses, medications, doctors and emergency contacts). This will help you as a caregiver, and you will be able to easily provide the necessary information to your care providers. Find out if the provider uses a care portal to store vital information.
- Share any important information on behavioral patterns, triggers and likes or dislikes. For example, if your loved one suffers from sundowning behavior in the evening and you have found certain things help, let your care provider know.
- Give some life history and background information to your care team. It helps create conversational topics and helps caregivers to see the dynamic person your loved one is.
- What activities does your loved one enjoy? A caregiver can help maintain the usual routine and favorite activities. Share as much information as possible

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