The Sibling Project Presents

Siblings Becoming Caregivers Family Transition

Care Notebook



Get to Know Your Care Notebook

What is a Care Notebook and how can it help

me? A Care Notebook is a valuable resource for siblings of individuals with disabilities and special healthcare needs to organize essential information about their sibling's care. Created with input from parents and siblings, it's tailored to support those who share the unique experience of caring for individuals with complex needs. Over time, siblings and families collect information and paperwork from various providers and services involved in their loved one's care. This Care Notebook helps keep the most important information in one place, making it easier to find and share with others on the care team. Store it online or print a copy to fit your preference.

Why build my own care notebook? Care Notebooks are very personal to your sibling and ideally should be customized to reflect your sibling's medical history and current information. Use this booklet to create your individualized Care Notebook and store resources for your loved ones to use in case of emergency.



Tips for Using Your Care Notebook

Fill out your care notebook ASAP Tell family & other siblings where this notebook is located in case of emergency

Store your notebook in an easy to find location

Update this notebook at least once a year. To make it easy, you could do it every year on your sibling's birthday.



FAMILY TRANSITION CARE NOTEBOOK

IN CASE OF EMERGENCY

- Me, My Sib, and Our Family
 - My Sib & Me
 - Our Goals
 - Our Supports
 - Supported Decision Making

HEALTHCARE

- You're a Caregiver, Now What?
- Online Logins
- Natural Supports
- Insurance & Coverage
- Professionals
- Medications & Pharmacy
- Nutrition & Allergies
- Medical Supply Information
- Durable Medical Equipment
- Dental & Orthodontist

ACCESS & ACCOUNT INFO

Phone & Finances

LEGAL & FINANCIAL INFORMATION

- Disability Rights Laws
- Transition University Resources
- Guardianship & Alternatives
- SSI/SSDI
- Financial Supports
- Parent's Will & Final Arrangements

MENTAL HEALTH

- Mental Health and Healthcare Resources
- Help Lines
- Iceberg???
- Notices & Acknowledgements



In Case of Emergency

Name:
Preferred Name:
Birthday:
Primary Diagnosis:
Medical Needs & Special Considerations (ie - do they wear oxygen, prone to seizures, etc.)
Essential Medications:
Preferred Hospital:
Allergies (Medication Specific):
Allergic to Pencillin Yes No
Medication Sensitivies:

The First 90 Days

Emergencies can happen when you least expect them. This page is here to help you feel prepared and confident, if you suddenly need to step in and take care of your sibling with a disability. Go through this workbook and, if there's any other essential information one would need to care for your sibling, add it here:



Child's Name:	Pronouns:
Nickname:	
Age:	
Diagnosis:	
(If you don't have a diagnosis, that's okay! mental, or emotional needs.)	It's important to remember your own physical,
Likes:	
Dislikes:	
Favorite Food:	
Favorite Color:	
Hobbies:	
Bucket List:	
Dream Vacation:	
I like to calm down by:	
I like to prioritize myself by:	
My needs feel met when:	



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Hobbies:	
Bucket List:	
Dream Vacation:	
I like to calm down by:	
I like to prioritize myself by:	
My needs feel met when:	

Our Goals

The tools on the next few pages can help identify the level of support your sibling needs to make important decisions, using three categories:



Independent decisions Decisions with support Decisions made by someone else.

Answer questions across life domains to determine support needs, spark deeper conversations, and set goals for building selfadvocacy.

Supported Decision-Making and Person-Centered Planning Tools



https://bit.ly/3rmmS0c





CHARTING THE LIFECOURSE | EXPLORING DECISION-MAKING SUPPORTS

This tool was designed to assist individuals and supporters with exploring decision making support needs for each life domain.

Name of Individual:					
Name of person completing this form:					
Relationship to individual (circle one):	Self	Family	Friend	Guardian	Other:
How long have you known the individua	l?				

For each question below, mark the level of support you need when making and communicating decisions and choices in the Charting the LifeCourse life domains.



I can decide with no extra support I need support with my decision



Daily Life & Employment

Image: Section of the sectio

Healthy Living

Do I choose when to go to the doctor or dentist?	
Do I decide/direct what doctors, medical/health clinics, hospitals, specialists or other health care providers I use?	
Can I make health/medical choices for my day-to-day well-being? (check-ups, routine screening, working out, vitamins)	
Can I make medical choices in serious situations? (surgery, big injury)	
Can I make medical choices in an emergency?	
Can I take medications as directed or follow a prescribed diet?	
Do I know the reasons why I take my medication?	
Do I understand the consequences if I refuse medical treatment?	
Can I alert others and seek medical help for serious health problems?	
Do I make choices about birth control or pregnancy?	
Do I make choices about drugs or alcohol?	
Do I understand health consequences associated with choosing high risk behaviors? (substance abuse, overeating, high-risk sexual activities, etc.)	
Do I decide where, when, and what to eat?	
Do I understand the need for personal hygiene and dental care?	

Continue on back »





CHARTING THE LIFECOURSE | EXPLORING DECISION-MAKING SUPPORTS

For each question below, mark the level of support you need when making and communicating decisions and choices in the Charting the LifeCourse life domains.





Social & Spirituality

Do I choose where and when (and if) I want to practice my faith?		
Do I make choices about what to do and who to spend time with?		
Do I decide if I want to date, and choose who I want to date?		
Can I make decisions about marriage? (If I want to marry, and who)		
Can I make choices about sex, and do I understand consent and permission in regard to sexual relationships?		



Safety & Security

Do I make choices that help me avoid common environmental dangers? (traffic, sharp objects, hot stove, poisonous products, etc.)	
Do I make plans in case of emergencies?	
Do I know and understand my rights?	
Do I recognize and get help if I am being treated badly? (physically, emotionally or sexually abused, or neglected)	
Do I know who to contact if I feel like I'm in danger, being exploited, or being treated unfairly? (police, attorney, trusted friend)	

論 **Community Living**

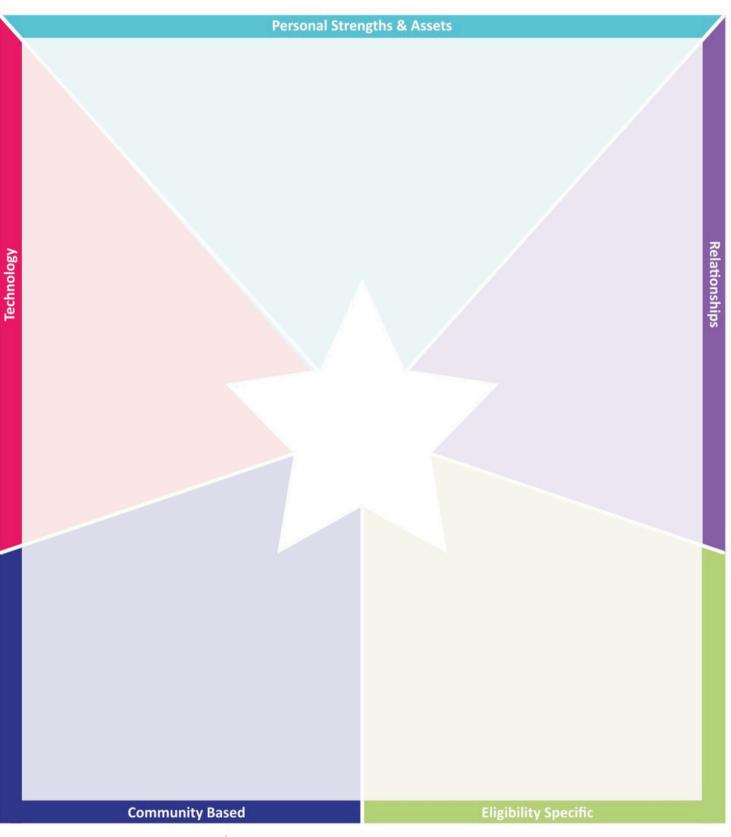
Do I decide where I live and who I live with?		
Do I make safe choices around my home? (turning off stove, having fire alarms, locking doors)		
Do I decide about how I keep my home or room clean and livable?		
Do I make choices about going places I travel to often? (work, bank, stores, church, friends' home)		
Do I make choices about going places I don't travel to often? (doctor appointments, special events)		
Do I decide how to get to the places I want or need to go? (walk, ask a friend for a ride, bus, cab, car service)		
Do I decide and direct what kinds of support I need or want and choose who provides those supports?		

Advocacy & Engagement

Do I decide who I want to represent my interests and support me?	
Do I choose whether to vote and who I vote for?	
Do I understand consequences of making decisions that will result in me committing a crime?	
Do I tell people what I want and don't want? (verbally, by sign, device), and tell people how I make choices?	
Do I agree to and sign contracts and other formal agreements, such as powers of attorney?	
Do I decide who I want information shared with? (family, friends etc.)	







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Developed by the Charting the LifeCourse Nexus - LifeCourseTools.com @ 2020 Curators of the University of Missouri ~|~ UMKC IHD + March2020

Creating a Supported Decision-Making Agreement.

Name, address, telephone number, and email
 The names and contact information of the people who will be supporting them
 A place for the supporter/supporters to sign and voluntarily agree to help them make decisions in the areas of life they choose
 A place where they identify the "life areas" they will need help with in order to be healthy, safe, and successful
 A place for them and their supporters to sign and date the agreement
 A place to talk about how the agreement can be changed or updated

Sample Supported Decision-Making Agreement

Name:	Date of Birth:	
Address:		
Phone:	Email:	

I need supporters to help make decisions in the following areas: (Check all that apply)

Finances	Personal Care
Legal	Daily Life
Healthcare	Other:

I express myself and state my desires in the following ways:

Verbally notifying people my likes and dislikes
Verbally notifying people what I do and do not want to do
Choosing from two or more things that are written down for me
Other:

– Supporter #1				
Name:	Date of Birth:			
Address:				
	Email:			
Relationship to me: Requested Support: Finances Healthcare Employment Legal Matters Housing Social Relationships Other Areas where I do not want assistance from Supporter #:				

Supporter #2, #3, #4, etc.

You can have as many people in your Support Network as you desire. You may consider having one member act as a Support Network Coordinator to assist in managing your team. Simply add as many supporters to your contract as you desire.

If I have more than one supporter, they will act:



Jointly (working together)

In the order listed

I understand that I can add new support network members if necessary, and change them whenever I need to.

Network Supporter Statement - Each Supporter Should Sign a Statement

I understand as ______'s supporter, my job is to honor and present his/her expressed wishes. I know I should not make decisions for this person, and I should assist them in reaching a decision and communicating his/her choice. I agree to support this person's decision to the best of my ability.

Signature

Healthcare

Utah Family Voices

Provides statewide assistance in a variety of ways to families of children and youth with special health care needs and disabilities as well as professional providers and partners. Utah Family Voices is a project of the Utah Parent Center and is run by parents of children with disabilities.

https://utahparentcenter.org/proje cts/ufv/ 801-272-1068



You're a Caregiver, Now What? Utah Family Voices Resources

Each link below will take you to a resource on these topics. We try to keep our resources up to date. If you have a problem opening any of the links, we would appreciate you letting us know.



To speak with a staff member from Utah Family Voices please call 801-272-1068 or email info@utahparentcenter.org

Online Logins

U of U Mychart, IHC Myhealth, myCase, USOR, etc.

Disclaimer: This is not a secure way to save passwords.

Utah ID (used to log into all State portals and accounts)
Username
Password
Default Email or Phone Number
Wobsito
WebsiteUsername
Password Default Email or Phone Number
Website
Website
Username
Password Default Email or Phone Number
Website
Username
Password
Default Email or Phone Number
Website
Username
Password
Default Email or Phone Number
Website
Username
Password
Default Email or Phone Number
Website
Username
Password
Default Email or Phone Number

Natural Supports

Transportation, Social Supports, etc.





https://bit.ly/3J7ci46





https://jobs.utah.gov

SSI Application





Medicaid Waivers



https://dspd.utah.gov/ medicaid-waivers/

UtahID



https://id.utah.gov

Insurance/Coverage

Insurance Name: Policy Number: Contact Person/Title: Address:	
<u>Phone:</u> Website <u>/Email:</u> Medicaid (ACO <u>Name, if applicable. This is the c</u> number on the Medicaid Card):	_Fax:
Insurance Name: Policy Number: Contact Person/Title: Address:	

Phone: Website/Email:

__Fax:

Medicaid (ACO Name, if applicable. This is the company name above your child's name and ID number on the Medicaid Card):

Basics of Insurance



bit.ly/healthinsurancevid

What is Medicaid?



https://bit.ly/3tEczWK

Medicaid Screening



https://www.healthcare.gov/

Utah Medicaid



https://bit.ly/3IK7S29



Professionals

Doctors, Therapist, Case Workers, Social Workers, etc.

Specialist Name & Specialty		
Online Portal		
Address	City	
Phone	State	Zip
Email		
Notes		
Specialist Name & Specialty		
Online Portal		
Address	City	
Phone		
Email		Zip
Notes		
Specialist Name & Specialty		
Online Portal		
Address	City	7:2
Phone	State	Zip
Email		
Notes		
Specialist Name & Specialty		
Online Portal		
Address	City	
Phon <u>e</u>	State	Zip
Email		•
Notes		
Specialist Name & Specialty		
Online Portal		
Address Phone	City	
		Zip
Email		
Notes		
Specialist Name & Specialty		
Online Portal		
Address	City	
Phone	State	Zin
Email		Źıp
Notes		

Medication & Pharmacy

Preferred Pharmacy: Address: Telephone:

Medication	Prescription #	Reason for Medication	Start Date	End Date

Nutrition, Favorites & Food Allergies

Medical Supply Information

Supply Companies	Product Description	Product Code	Quantity

Durable Medical Equipment

DME Perscription Number	Diagnosis Code	Physician	Follow Up Contact Details

Dental & Orthodontist

Dentist's Name: _____

Address:----

Telephone:

□ Dentist has been informed of child's medical condition and medical specialists

Orthodontist Name:

Telephone:

□Ortho has been informed of child's medical condition and medical specialists

Dental Procedure History	Dentist / Ortho

Access and Account Information

Phone Plan

Provider Name:____ Telephone:

 $\hfill\square$ Siblings have been added as an authorized user

Finances

Banking Institution:

□ Siblings have been added as an authorized user

Use the lines below to store other financial information like how to access trusts, ABLE accounts or estate plans.

Disclaimer: This is not a secure place to store passwords.



Legal and Financial Information

Content for this section was taken from the Transition University Choices booklet and information from our partners at the Special Abilities Network.

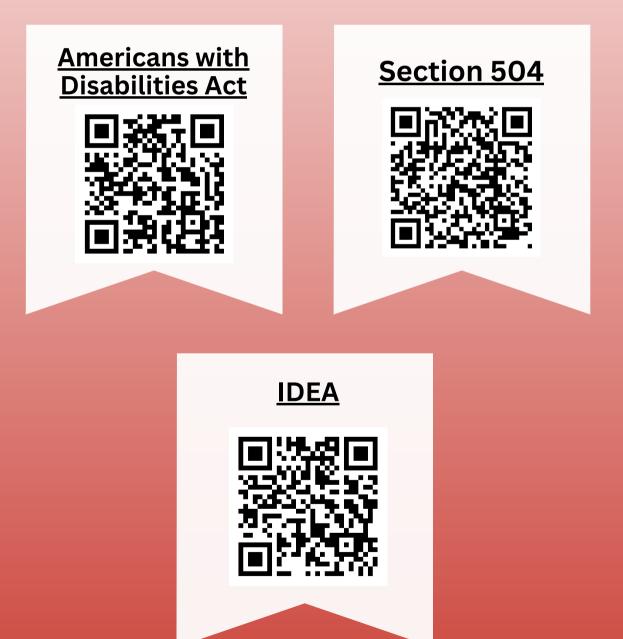






Understanding Disability Rights Laws

Each link below will take you to a resource on these topics. We try to keep our resources up to date. If you have a problem opening any of the links, we would appreciate you letting us know.





Transition University Resource Guide

Each link below will take you to a resource on these topics. We try to keep our resources up to date. If you have a problem opening any of the links, we would appreciate you letting us know.





Utah Courts website for the Procedure for Appointing a Conservator:



https://bit.ly/3iyc0rn

What is Conservatorship?

Conservatorship is a legal status that is a companion to guardianship. It does not replace it. The court appoints a conservator or person to manage the financial and personal affairs of a minor or incapacitated person. A conservator may also serve as a guardian who is responsible for establishing and monitoring the physical care of the individual and managing their living arrangements.



What is Guardianship?

In Utah, individuals are considered legal adults at 18, even if they have disabilities impacting their decision-making. While many can make decisions with support, some may need guardianship for areas like healthcare or safety. Guardianship can adapt to changing abilities and circumstances. Parents or caregivers are often given preference, and the process in Utah is now simpler and more affordable.

Guardianship Book:



Guardianship, Conservatorship, Power of Attorney Information:



bit.ly/GuardianshipOptions

Power of Attorney

What is a power of attorney?

A power of attorney (POA) is a legal document allowing one person (the principal) to give another (the agent) authority to act on their behalf in specific areas, such as finances or medical decisions.

There are two types:

- Durable, effective immediately, and
- Springing, which activates under specific conditions.

A POA can be broad or limited to tasks like handling bank accounts, managing property, or applying for benefits, but it does not cover all aspects of a person's life.

Use these links and QR codes to access more information and Power of Attorney forms



https://bit.ly/3LfLAXt



General Power of Attorney



bit.lv/UTpowerofattorney



https://bit.ly/UTpowerofattorney

Differences between SSI and SSDI?

SSDI

SSDI provides support to individuals with disabilities who have a qualifying work history, either their own or through a family member, based on disability and work credits. Disabled Adult Children (DAC) may qualify for benefits through a parent's work history.



SSI determination is based on age or a disability that is expected to last 12 months (excluding blindness) or result in death. Not performing SGA.

Terms

SGA: Substantial Gainful Activity or earning more than a certain amount TWP: Trial Work Period - test ability to work while receiving social security

Factor	SSI	SSDI
Eligibility based on	Age (65+) OR blindness (any age) OR disability (any age) that is expected to last 12 months and not be performing SGA	Disability expected to last 12 months AND sufficient work credits through own/family employment
When benefits begin	First full month after the date the claim was filed or, if later, the date found eligible for SSI	Wait 5 full months after the onset of the disability before receiving benefits. There may be up to 12 months retroactivity
Maximum benefit (monthly) There are also max. family amounts	\$841 (single) in Jan. 2022 (based on income)	\$3,345 in 2022 (based on work history)
Health Insurance	While you should qualify for Medicaid, you are required you to file a separate Medicaid application.	Automatically qualifies for Medicare after a 24-month waiting period from time benefits begin (no waiting with certain medical conditions)

Determining if my sibling is eligble for SSI / SSDI:



https://ssabest.benefits.gov/

A basic explanation of Special Needs Trusts and how they work. It is recommended you consult an attorney to set up a trust.



General information on ABLE accounts, including a brief video:



Additional Financial Supports to Consider

Low Limit Credit Cards

Credit cards can be very challenging for many people to manage. It can be tempting to use them to pay for things when funds are not available. However, if the entire balance isn't paid off each month, interest fees will be incurred. One way to help young adults learn how to responsibly purchase things on credit is to start with a low spending limit card so they avoid buying items they can not really afford and learn to buy only those things they can pay off quickly.

Joint Bank Account

A parent or another trusted adult who is on the young adult's support team can have a joint bank account with the young adult. This makes it so the young adult can manage their own finances. but they have the safety net of another person looking at their statements and bank balances to make sure everything is in order. If a member of your support team notices that something is not like it should be, for example, they missed an important payment, they can help correct the problem. Electronic deposits, direct deposits, and/or electronic bill payments are additional options to consider.

UTMA and 529 Accounts

Uniform Trust Minor Account provides a way to transfer a wide variety of assets to a minor beneficiary. The funds can be spent on anything that benefits the minor. When the child reaches a designated age, the assets are theirs. These do become a child's assets, so keep this in mind when qualifying the child for public benefits. These funds can be moved into an ABLE Account. However, there are limits on how much you can transfer into an ABLE account per year. UTMA funds are the child's money so it is a countable resource when trying to qualify for SSI and Medicaid. Therefore, this money would not be able to be moved into a Supplemental Needs Trust.

A 529 plan is a savings account that is specifically intended to help pay for educational expenses. Both accounts have pros and cons. Work with a financial advisor to determine what is best for your family. Be aware of assets that are or will be in the name of your child with a disability and how that might impact their ability to qualify for SSI and Medicaid. They can have no more than \$2,000 in their name, unless the funds are in an ABLE Account.

Financial and other Types of Power of Attorney

For information regarding Power of Attorney, please see pages 18 - 21 including a detailed explanation and resources.

Will vs A Living Will

Traditional Will

A traditional will states what will happen to assets and property when an individual passes away. A living will, is a legal document designed to direct loved ones (agents) on how to handle certain aspects of the individual's life if they become incapacitated, such as healthcare.

Living Will

A Living Will is a legal document that lays out an individual's preferences regarding health care, such as your refusal or acceptance of a medical treatment, in addition to the optional selection of a chosen agent or decision maker. Utah's Advance Health Care Directive also includes a living will.

A Letter of Intent

A letter of intent outlines your sibling's future plan, including living arrangements, employment, social needs, medical history, and financial management. It addresses who will serve as trustee, manage benefits, and act as an advocate or guardian. While not legally binding, it helps ensure continuity of care and support by documenting your wishes and existing supports to guide others in your absence.

Creating Final Arrangements

Desires for your sibling's funeral arrangements – including – prearrangements you have made (if any), choice of the funeral home, burial, cemetery, monument, religious service, and clergy.

Ask your parents to include any other information you feel will help the you or your other sibling's provide the best possible care for your affected brother or sister. This letter should be placed with all other relevant legal and personal documents concerning your the affected sibling. Do not forget to sign and date the letter.

Mental Health You & Your Sib

Content for this section was taken from the Transition University Choices booklet and information from our partners at the Special Abilities Network.





Mental Health & Healthcare Resources

Utah Suicide & Crisis Line 800-273-TALK or Dial 988

The Utah Suicide and Crisis Line provides compassionate support. We give referrals to anyone in need of mental health or emotional wellbeing services. Whatever age you are, you can call for help 24 hours a day, 7 days a week, 365 days a year. There is no cost. We have interpreters in more than 150 languages to help. The line is managed and staffed by certified crisis workers at the Huntsman Mental Health Institute (HMHI). This 800 number recognizes the area code of caller ID and transfers Utah area code numbers to the Utah team. If you are calling from a non-Utah area code, but you want a Utah response, call the local number 801-587-3000.

CALL-UP: for Utah Medical Professionals

Utah now has a state-wide psychiatric consult service. HMHI (formerly UNI) has teamed up with the Utah State Division of Substance Abuse and Mental Health to create the Consultation Access Link Line to Utah Psychiatry (CALL-UP). CALL-UP is a new legislative-funded program designed to address the limited number of psychiatric services in Utah and improve access to them. This state program will help serve patients at no cost to providers or patients in the state of Utah. The goals of the program are to:

- 1. Optimize primary care providers' ability and confidence to diagnose and treat mild to moderate mental health issues;
- 2. Improve quality of care and health outcomes for patients by affording early interventions;
- 3. Promote and improve mental health and physical health integration; and
- 4. Ensure appropriate referrals for individuals with serious behavioral health concerns.

This psychiatry consult program will support primary care providers in meeting the treatment needs for their patients' mental health. Staff is available Monday - Friday from 12:00 pm to 4:30 pm by calling: 801-587-3636. Or the email is: Callup@hsc.utah.edu

Utah's Mental Health Agency - OSUMH Office of Substance Use and Mental Health

Take Care Utah, a Utah Health Policy Project initiative, is a network of nonprofit organizations focused on helping people with health insurance. It consists of about 50 enrollment specialists all across Utah. All services are provided free of charge. For any additional questions about Take Care Utah, contact Utah Health Policy Project (UHPP)



https://dsamh.utah.gov/



https://takecareutah.org/

https://bit.ly/36P92Mf

Warm Line 833-SPEAKUT (833-773-2588)

Talk to someone who's been there before and understands. Sometimes you may need a supporter as you heal and recover from your own personal struggles. If you need to talk with someone, you can call the Utah Warm Line for that support. The Utah Warm Line is free for all callers. When you call the Utah Warm Line, you will speak with a certified peer support specialist. Our peer support specialists have gone through specialized training. They have also lived through experiences like yours—mental illness and substance misuse that is disrupting your happiness. Call for support today!

Healthy Minds Utah - TAKE A SCREENING

If you are concerned about yourself or someone you love, take a few minutes to complete an anonymous self-assessment.



https://bit.ly/35l4P2C

myStrength

A free, online tool to help you live your best life. You'll find help for stress, anxiety, chronic pain and more. It's safe, secure and personalized – just for you. Track your health, enjoy activities, and become inspired. myStrength has recently added resources and supports surrounding COVID-19 and the behavioral health needs that you may have during this time.



https://dsamh.utah.gov/

SafeUT App

Download the SafeUT and crisis prevention 24/7/365 to students, parents, educators and others. You can chat with a licensed counselor for support or submit a confidential tip right from your smartphone, or call 833-372-3388 to talk about what is on your mind.

Stabilization & Mobile Response (1-833- SAFE-FAM)

For families with children/youth ages 0-20 experiencing mental health challenges. Overthe-phone support and problem-solving, mobile response services, and in-home stabilization services to help your family stabilize and self-manage future challenges. Free, family guided, and youth-driven. <u>https://hs.utah.gov/smr</u>

Emotional Health Relief Line - 833-442-2211

Intermountain Healthcare is offering a free emotional relief hotline for anyone who needs mental health support related to COVID19. Caregivers are available 10AM to 10PM, 7 days a week.

National Alliance on Mental Illness (NAMI)_ https://www.namiut.org/

American Foundation on Suicide Prevention Utah Chapter <u>https://afsp.org/chapter/utah</u>

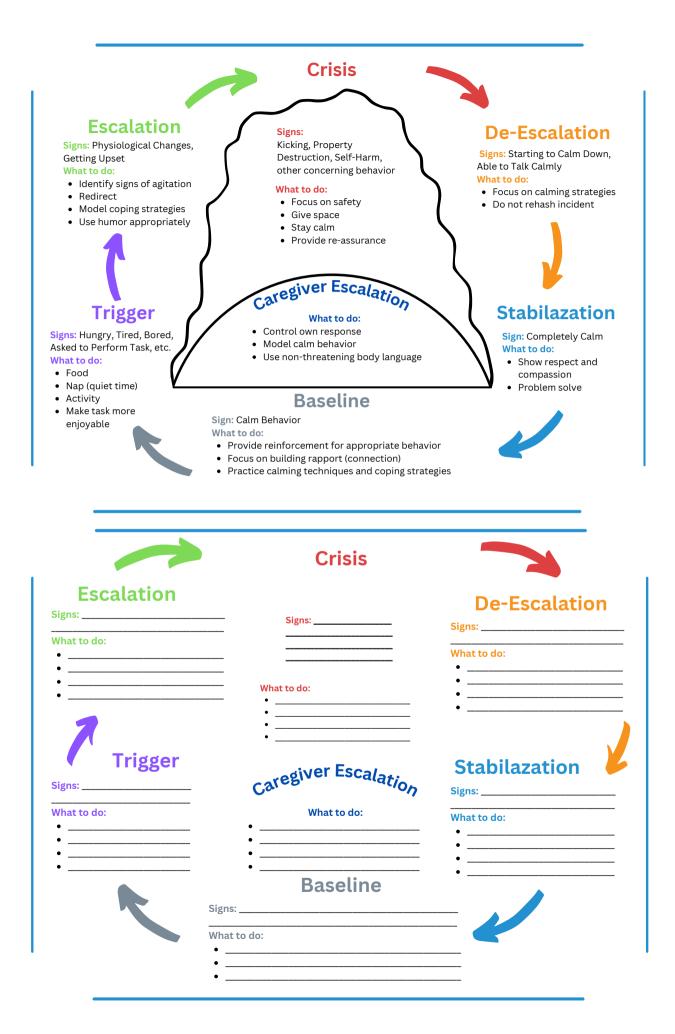
Caring Connections

The University of Utah, College of Nursing offers a variety of grief support groups throughout the year. Each support group is designed to help you cope with a different kind of loss and grief, including suicide. The groups are eight weeks in length and are facilitated by expert clinicians in the fields of social work, nursing, counseling, and psychology. https://bit.ly/3KCRlhx











We wish to thank & acknowledge Utah's Title V Maternal Child Health Services Block Grant administered through Utah's Department of Health and Human Services at the Division of Family Health.

The Sibling Notebook was inspired by the archived Care Notebook created by Utah Family Voices & Medical Home Portal.

Scan to view the archived resources:







Medical Home Portal

For more information from Utah Family Voices call 801-272-1068, visit utahparentcenter.org, or email info@utahparentcenter.org

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