

## MyBrain

### Chapter 4: Memory Tools

#### **Good Memory Starts with Organization**

Most people think that good memory means good retrieval. But actually, that's putting the cart before the horse. Good memory starts with use of strategic learning tools that build healthy habits and daily routines.

The fact is that well organized people have fewer memory problems. Active memory is limited to 7 bits of data, and realistically decreases to 4 bits in hectic real life situations, for a time span of 10 seconds. Unless information is immediately written down in a well-organized fashion it will likely be forgotten completely, recalled in a piecemeal fashion, or worse yet, distorted by misinformation.

#### **Beware Of a One-Size-Fits-All Means of Improving Your Memory**

Specific types of memory loss require you to correctly assess the problem and then choose the right task management tool. Simply playing games that improve concentration will not help you remember appointments or whether or not you took your medications. Practical memory tools will include ways to better organize and communicate your thoughts, to manage your time, plan your daily routines, let you know when you have slipped off track as well as coordinate your schedule with others in your life.

Habits and skills that are practiced frequently become hard wired into the brain making them more resilient to forgetting. That's good news! You will generally remember the necessary procedures to complete routine daily activities, but may require a reminder to complete these activities on a regular basis. Even better, it is possible to train new habits and behavioral patterns through this same process of guided instruction and multiple learning trials.

#### **Organizational Tools Build Autonomy, Self Esteem and Emotional Control**

The use of organizational tools encourages self-learning. Because it is active, information will be retained at a deeper level. It also builds autonomy and self-esteem. Having access to memory tools encourages us to plan, balance and self-correct during our hectic day. We can begin to feel in control of our lives once again. Rather than relying on others to provide us with information having the right tools to look up information up for ourselves can be very empowering.

#### **Selecting the Right Organizational Tool**

There are many types of organizational tools available to fit your personal style. Options range from pocket calendars, to smart phone apps as well as communal kitchen white boards. It doesn't matter which tool you choose; whether high tech or old school, what matters is that you use it faithfully.

*“Efficiency is doing things right. Effectiveness is doing the right thing.”*

Peter F. Drucker

## A. Manage Your Time: Activity Calendar

Calendars can help you plan, balance and regulate your day. Family obligations, social activities, physical exercise, and work duties can be viewed in one location. Likewise, it brings up schedule conflicts or double bookings, in plenty of time to reschedule to prevent disappointment and hurt feelings.

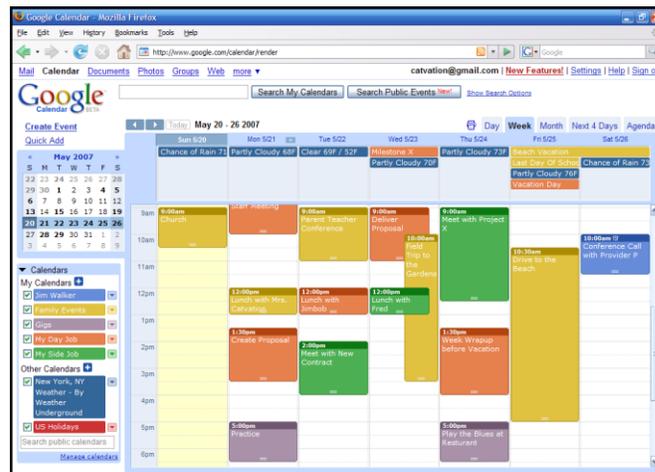
Check your calendar first thing when you wake up and frequently through the day to evaluate whether you are on track. The ability to self-correct, or change course in mid-stream is essential in life. Having a mental map of your daily activities reduces anxiety and allows you to better allocate your time. Like money, time is a limited resource. You will spend more wisely by checking your bank balance or activity schedule first.

### 1. Personal Tool

A simple pocket calendar or desk calendar may be all you need.

### 2. Electronic Tool

Most smart phones offer free online calendars. You can create separate sub calendars in different colors to organize your life into various categories, such as work, finances, home, brain wellness and projects. It's really unlimited. It comes down to personal preference, experimenting with different layouts and finding something that works for you.



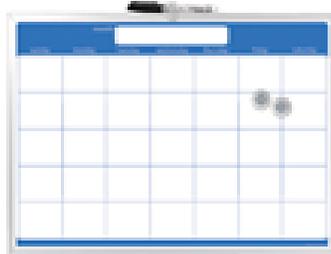
### 3. Communal Tool

Electronic calendars have become a popular way to share or coordinate activities on your calendar with family or coworkers. A low tech solution is the multipurpose whiteboard or large communal calendar. Use of a personal calendar is great, but the more commitments and appointments you have that involve family, or will involve health care aides and transportation helpers, the more valuable a

communal calendar becomes. Everyone involved in your life needs to be on the same page. If your calendar is in your desk or purse it can be too easily overlooked.

### **Communication Central**

Having one central location to communicate information increases the likelihood it will be read and followed. Consider prominently displaying the white board or a large calendar in the kitchen or common area.



### **Advantages of a Communication Board**

#### ***Everybody Knows the Game Plan***

A community calendar is a handy place for family to check special events, daily routines and appointments. If it involves more than just your time, putting the information in plain sight avoids communication glitches, over booking and hurt feelings.

#### ***Out of Sight Out of Mind***

Information that is not in plain sight can be overlooked.

#### ***A Little Reminder Never Hurts***

A large calendar that we have to walk by everyday gets us into the habit of talking about and writing down appointments, regularly scheduled activities and information. It can be easily referred to and updated on a daily basis.

#### ***Building Good Habits***

By getting into the habit of checking your calendar several times a day, it will help improve your planning and organization skills.

#### ***Heads Up***

By having all your appointments written down, it will reduce frustration by allowing everyone plenty of time to prepare for upcoming events.

### Helpful items to post on the calendar

- Any Routine Personal Activity: If you want to ensure that the time you have carved out for yourself is respected by others, it pays to advertise that you will be unavailable at that time.
- Physician's Appointments
- Family Obligations
- Special Events and Activities

### B. Manage Your Day: Daily Routines

You don't have to be a Yeti master to achieve a more calm and balanced life. Sometimes all it takes is a little more preparation. By checking your day planner the night before and several times throughout the day, you can make sure you stay on course, and know what your options are when life sends you in a different direction.

You will feel less anxious and sleep better with increased structure, predictability and routines in your day.

#### 1. Anchor Points

Establishing habitual activities can serve as an anchor for the brain from which one can "hook" on other activities. Lack of scheduled activities makes it very difficult to get anything accomplished. List the times you wake up, eat meals, take medications and go to bed.

#### *Morning Review*

Check in with yourself and assess your physical, emotional and cognitive state. It will help set a productive tone for the day

- **Emotional temperature:** You are encouraged to begin your day by taking your *emotional temperature*. If you woke up feeling fatigued, out of sorts or if you need to juggle an unforeseen obstacle, this is the time for action.
- **Triage:** If you see a train wreck coming, now is the time to reschedule. Although you're first inclination may be to roll over and go back to bed, this will only make matters worse. Just pick up the phone and let the party who may be waiting on you know that plans have changed. The first step in learning to be kind to you is to give yourself permission to adjust to changes in life circumstances. Once you have gotten your obligation covered or rescheduled, then you can go back to bed.

#### *Power Hour*

We are aware that certain times of day make us feel more alert and energetic. However, we can also experience similar rhythms in moods. Learn to recognize when you feel most positive, creative and optimistic. Then, schedule tasks that require strategic problem-solving into these time slots.

Recognize that these hours are precious and fleeting; you will need to save them for tasks that are of the highest importance to you. The following tips may be helpful to make your power hours more productive.

- **Mindfulness Meditation:** Certain types of meditation can increase a balanced state of mental clarity and emotional detachment. This combination of focused calm, or mindfulness meditation is an ideal exercise before performing executive function tasks. To learn the benefits of meditation to improve sleep, focus, mental awareness and calm investigate Headspace, <http://www.getsomeheadspace.com>, a free computer app. that aims to demystify meditation and make it applicable to everyday life. Meditation is presented in 10 easy-to-learn steps to help you find a bit more clarity and calm in your everyday life.
- **Brain Entrainment:** Some people report an improved quality of meditation by pairing the practice with specialized audiotapes that induce or train a desired brainwave, such as beta for heightened alertness and concentration. Look into the benefits of binaural beats on <https://itunes.apple.com/us/app/brain-wave-30-advanced-binaural>.
- **Project Agenda:** You will likely get started more easily if you have given consideration to exactly what your goal is for that 1 or 2 hour block of time. Construct a memo using an outline format, stating the task and subtasks you want to accomplish. Prepare project memo for the following day's Power Hour during Evening Review time.
- **Timers:** Review the benefits of using a timer to ensure that you stay productive and don't slip off track.
- **Guard Your Time:** Set your email to deliver messages every few hours to avoid getting distracted. Set your phone to voice mail. If you can't work from home consider going to the public library and checking out an office for several hours.

### ***Wind Down***

Begin preparing for a successful day by establishing evening routines. Remember, it is just as important to establish evening habits as it is to have early morning routines...sometimes more important. What you do the evening before can help you plan for a successful day.

- **Set a Regular Bedtime:** Don't make the mistake of having a flexible bedtime. You're fooling yourself if you think you will ever complete everything that needs to get done before bed.
- **Work Backwards:** When do you have to be at work the next day? Then determine what time you need the house, followed by when you need to be up in order to dress, eat and take care of all obligations. Now you work backwards 8 hours from when you set your alarm to get up and you have your bedtime. If your chosen bedtime is 10:00 pm, you should be thinking of winding down activities by 8:00 pm.
- **What to Avoid:** If you have trouble sleeping, analyze what you are doing before bed. Avoid working on physically, emotionally or cognitively demanding activities after dinner.

### ***Evening Review***

Based on today's outcome, can you realistically accomplish what you have set out on your plate for tomorrow? If not, this is when you need to modify or rearrange your schedule. These notes can help guide you in preparing your daily memo to yourself, family members or coworkers for the next day.

- **Write Down your Worries:** Get into a habit of writing your worries down on a To Do list or journaling thoughts and events before bed. You can release them knowing you have a plan for the next day.
- **Project Memo for Next Day:** Make sure you have an agenda for your Power Hour for the next day. Ask yourself is the time frame given to complete the task sufficient. If you have been too generous the task will expand to fit the time. Not enough time, and you will feel you never get anything crossed off your list.
- **Review Your Calendar:** Make sure you have a head's up for the next day.
- **Time for Triage Again:** If you know you have double booked, are feeling backlogged, or unable to meet an obligation for any number of reasons that life goes awry, now is the time to pick up the phone and set things back on course for tomorrow.

### ***Bedtime Routines***

Bed time routines could include listening to relaxing music, reading or listening to books on tape, drinking tea or engaging in evening meditation exercise.

- **Relaxation Meditation:** Deep, slow breathing, also a form of brain entrainment can de-activate the "flight or fight" side of your nervous system, protecting the brain from the damaging memory effects of excessive stress. Just as certain mediation exercises prepare one for the day; alternate practices can rewire the brain for sleep. Consider pairing meditation practice with a binaural beat CD to entrain Alpha Theta brainwaves, associated with relaxation and sleep.
- **Practice Gratitude:** Here is a great wind down meditation exercise. Get into the habit of "Practicing Gratitude". Review the day and remind yourself of everything that you have to be thankful. Try to make sure your blessings exceed your worries. If you are being honest with yourself, this shouldn't be hard.

### ***A Good Night's Rest***

The brain consolidates information into well organized and formed memory during the REM stage of sleep. Sleep is essential towards reducing worry and other mood disorders. Having trouble sleeping? Try reviewing suggestions in Chapter 2, Section D, under "A Good Night's Sleep".

### **C. Organize Ideas: Outline**

Outlining is the most effective way to organize information in our brain. Outlines provide a framework for structuring your thoughts. By using a simple outline format with a major header followed by no more than 3 sub points you can ensure information is clear, concise, well understood and retained.

## 1. Personal Tool

### Because Seeing *Is* Understanding

Learning to organize, edit and clarify your thoughts in an outline format can make you a more effective communicator. Hone your communication skills on paper first. You can send an email or snail mail. With outline in hand it will make it easier to place or return phone calls and ensure your message is clear and authentic.

## 2. Electronic Tool

### Mindmapping

If you're the kind of person who likes to brainstorm and diagram ideas in the form of a decision tree, then check out a mind-mapping application like [Mindjet MindManager](#), [Mindnode](#), [XMind](#).

## 3. Communal Tools

Being able to convey ideas in a well-organized and concise manner ensures that information will be better comprehended if not *received* by others.

Communication Memos should be sent to anyone that you are invested in having factual, objective and timely information. This includes family members, attorneys, accountants, doctors or therapists. By saving the memo into a Communication Folder you will have a record to refresh your memory of the events.

Introduce one main idea or topic, followed by 3 sub ideas. Remember to specific, concise and organized. Then allow 3 lines for the recipient to address their questions or comments. Encourage saving and filing old memos in a notebook. If using electronically, "Save to" a monthly folder. It is helpful to look back to see how a prior issue was resolved as it will likely come up again.

### D. Manage Tasks: Project Memo

An outline format can help guide you through the largest project to the most routine activities in your life. You can learn to identify target goals and break down tasks into smaller, more manageable subtasks. By including projected deadlines it will build in accountability and allow you to evaluate outcomes and modify your plan as needed.

### Reinforce Strategic Thinking

Task memos reinforce goal setting, sequential planning and self-correction skills. By using a simple outline form with a major header followed by no more than 3 sub points, you can learn to target goals, break down and prioritize tasks into manageable subtasks. By including projected deadlines it will build in accountability and allow you to evaluate outcomes and modify your plan as needed.

### Accountability

Get into a habit of reviewing your Project Memo each evening during Evening Review. If a task could not be completed, you are encouraged to pinpoint why you were unable to meet your stated goals. Was there an environmental obstacle or internal state that seemed to get in your way? Can you

delegate the task or ask for assistance? Consider whether the task needs to be clarified or broken down into smaller steps or the timeline extended. Remember, unfinished tasks don't go away; they are simply moved to the next day's Project Memo.

### 1. Personal Tool

A project will be better understood and run more smoothly if you break it down into smaller, more doable chunks before starting. A project outline should include:

- **Intention:** Begin by stating your intention or what you want to accomplish.
- **Context:** How is this project fit in to your current life? How is related to other activities, responsibilities or goals in your life?
- **Subtasks:** Break down the job into essential tasks.
- **Prioritize:** Rank the steps in the order they need to be performed.
- **Deadlines:** Identify when the project needs to be completed as well as the dates you expect each subtask to be performed.
- **Progress Report:** Set a date to review project status.

### 2. Electronic Tool

Several online tools based on the outline method to help organize ideas and information include Thinklinkr and Knowcase.

## E. Manage Future Tasks: To-Do Lists

The use of multiple sticky notes to keep track of information should be avoided as these can easily become misplaced, disorganized and overwhelming. To-do lists are the most accurate and reliable method for remembering intentions or reminding oneself to do something in the future.

### 1. Personal Tool

You can easily develop your own To Do List. Suggested categories include those for routine errands, such as going to the grocery, drug store, pharmacy and miscellaneous. You might also find it helpful to list things you wanted to mention to family or doctors.

### 2. Electronic Tool

There are a number of free online programs to help manage all the tasks in your life. All synch with electronic calendars and come with computer app's for your mobile devices. You can avoid having to rely on sticky notes and random scraps of paper which never seem to make it to your purse or coat pocket once you get to the store. Now you never have an excuse for prospective memory loss or forgetting to pick up your dry cleaning on the way home from work.

Remember the Milk , Toodledo and Teux Deux are free applications which offer more bells and whistles for a monthly fee.

## F. Manage the Minutes: Timers, Clocks and Alarms

### Timers

The very electronic tools designed to help us become more efficient now leave us no quiet space to get our work done. Timers help to impose some small degree of sanity into a chaotic world.

#### ***Avoid Project Creep***

A timer helps you “quarantine” tasks into blocks of your day so they don’t spread out and consume your entire day. Instead of making your goal to clean out the garage or complete a report, break down the task into 45 minute tasks and you will get a firmer handle on where to start...and most importantly, where to stop. Even if you have to get that job finished today, you become more aware of just how long it is taking and can adjust your pace or task load as necessary.

#### ***Avoid Task Drift***

When you consciously set a timer for 30 minutes, you are committing to working on *only* that task. Minutes are ticking away, *literally*, which gives you the fortitude to avoid letting your attention stray to checking your email, picking up a phone call or beginning another task. Even the most unruly of attention spans can be tamed by the ticking of a timer.

#### ***Increase Your Perception of Time***

Some people have a difficulty judging time. Either they get lost in an activity or they underestimate how much time something will take. When you let your work expand to fill all available space in your workday, you really have no idea how long anything takes to accomplish. All you know is work takes all day and there will be more when you come back tomorrow. Using a timer will give you a more accurate perception of the time and commitment various tasks will take to complete. Not only that, but the time estimates you give other people will become more accurate and they will view you as more reliable.

#### ***Enjoy Guilt Free Breaks***

Regardless of whether you finish the task or not in a specified time frame, when you commit to work hard for a limited amount of time, you have been productive and accomplished *something*; as a result, you will feel like you have earned your break.

### 1. Personal Tool

Select the simplest timer to get the job done. Timers can do a lot of neat things...but, are all those functions really going to help you get your work one? The last thing you want is to get distracted with a lot of gadgets on your productivity timer.

When you're first getting used to timers, you may find it helpful to start with a simple old fashioned kitchen timer rather than one connected to your computer or smart phone. It's too tempting to go check your inbox for mail. What's that? New voicemails? In this case, simple really is better.

Interested in knowing more about how to enhance focus and reduce the anxiety of time? Check out the free eBook <http://www.pomodoro-technique.com> or **Pomodoro**.

## 2. Electronic Tool

A free, very useful and simple device for your smart phone and computer is offered by **Focus Booster**. Customize time and sound settings. Color changes as time goes by for quick, peripheral updates. Alarm/buzzer sounds for completed sessions.

## Clocks and Alarms

Clocks not only allow us to monitor the passing of time to increase concentration and productivity, but they also ensure we are on time for appointments and remember to take scheduled medications. For those who find that they can easily lose themselves in a task or forget to do routine activities, a little cue can be all they need. How to decide with all the options available? Narrow the selection by first determining your purpose. Will you be working from home, school, the office or on the go all day?

### 1. Personal Tool

A simple home alarm clock may be all you need.

### 2. Electronic Tools

In the software realm, a host of free clock and timer applications are available for your computer or built right into your smart phone. If you get annoyed with more traditional-sounding alarms, you might prefer a soft gong or Tibetan bell to let you know it's time to change tasks. See **Your Meditation Timer**. However, for busy folks and students who need to be reminded for every hour and everyday of the week, consider a more extreme measure like **Alarm Clock-Timer-Reminder Pro**.

For individuals who would benefit from a more visual cue, **Vector Clocks** offers various types of analog clock faces as an application for your computer. Probably the most concrete image available in order to "see" time and answer the question of "how much longer" is provided by **Time Timer**. As time elapses, a red disk overlapping the clock face disappears, creating a graphic image of the passage of time. Clocks come in various sizes so you can take them anywhere. In addition, you can choose from a wrist watch or applications for your computer and smart phone.

## G. Manage Your Life: Day Planners

Most people need to organize a multitude of different types of information on a daily basis, including phone numbers, appointments and grocery lists.

### 1. Personal Tool

To make your own a day planner, start with a 3-ring binder; include a calendar, tabbed organizational sections and folders. Suggested categories include:

- **Calendar:** Create a mental map for your day. Be sure to include your Daily Anchors as well appointments, special events and Brain Wellness activities. Being able to anticipate the sequence

of daily events can help you feel more in control and prepared to deal with life's changing scenarios.

- **To Do Lists:** To-do lists are the most accurate and reliable method for remembering intentions or reminding oneself to do something in the future. These can be preprinted with headers to remind you what items you will need to pick up at the grocery and drug store, errands to run, things to tell a significant other, appointments to schedule, and miscellaneous items.
- **Task Memos:** Consider having notepaper already printed with a simple outline or memo format. For example, use a major header with no more than 3 sub points to facilitate note taking. Steps should be prioritized and written in step by step fashion. Create separate memos when learning new tasks or prompting new habits.

## 2. Electronic Tool

Windows 2010 has a new electronic notebook system, **OneNote**, which allows you to manage and organize a project from inception to completion. Create a notebook which can be subdivided into tabbed sections, each of which containing one or more pages. On a page, you can type notes, scribble with a pen, or even paste a drawing or a snippet from a web page. Note taking templates prompt you to complete Objectives, Tasks, Ideas and Q and A. There is even an option to synch to your electronic calendar to make sure your project meets its deadline.

**Evernote** is a free electronic note organizer which if you believe their web page can makes it easy to remember things big and small from your everyday life. Save everything cool and exciting you see online and in the real world. Snap a photo, record some audio and save it. Notes, web clips, files and images are made available on every device and computer you use. Some handy features include **Evernote Hello**, the electronic answer to the name tag, to help remember new people.

## H. Organize Your Stuff

You can purchase inexpensive card board file boxes and alphabetical dividers to help sort your piles. Try putting them in categories, either by room location, family member or level of urgency. For example, use a blue label to mark boxes that contain information that you will not likely need in the next year and can be stored away, a green label for middle priority and orange for top priority, or frequently referred to information.

Tape files cards on the side of each box to document its content so you can easily recognize where to look in the future. This system works for sorting and storing stuff in general. Try and make a habit of going through blue labeled or cold storage boxes once a year. Whether its clothes, household items or documents, if you haven't touched it in a year, do you really need it?

Keep important documents like insurance papers and medical records in a file cabinet or other designated location. It's a good idea to store policy numbers and passwords on your phone, under password protection in case of an emergency. You may want to consider storing certain records that need to shared, such as medications on a file sharing cloud.

## **I. Manage Your Money: Financial Planners**

Resources are limited. Whether you're trying to keep better tabs on your time, energy or money, you can rely on strategic thinking skills to make better decisions on how to allocate your financial resources. While daydreaming about unlimited wealth money and winning the lottery may be a nice diversion, learning to develop wise spending habits, no matter what your current income, can help you achieve emotional balance in your life.

### **Keeping Tabs on Your Life**

If the idea of financial planning or using an accounting spreadsheet sheet sounds foreign to you, then you're not alone. Many people who have difficulty with organizing their time and accomplishing daily tasks have similar problems with managing their money. That's because the necessary cognitive skills to accomplish these similar activities require executive function. Whether you're trying to manage your life or your finances, you need to be able to plan, organize, task monitor and self correct.

### **What Does Money *Mean* to You?**

Whether evaluating your health or money issues, without having the courage to know where problem areas lie, and why you got there, you will repeat old habits. Habits are stored in the cerebellum. For good or bad, habitual behaviors become hard wired in the brain through practice and are resistant to change.

Indecision and inaction is often the result of limited information. Having access to objective and tangible data, for example cholesterol numbers can often lead to an "ah, ha moment". Remember self-awareness is a frontal lobe skill and is considered the highest of all brain functions.

### **Track Spending Habits**

To get a clearer picture of your financial picture begin by taking careful inventory of your spending habits. By developing a spread sheet you can clearly see how much you spend on basic necessities of living. For example, housing, car, medical, food, entertainment, utilities, ect. The results may surprise you.

### **Take Inventory**

We can't avoid filing taxes, so use this imposed deadline to take inventory and determine if you are on track with their financial goals. These records allow you to see what changes need to take place in your daily habits in order to correct imbalances. For example, are you spending too much in one area and neglecting some other need?

### **Balance the Books**

If you are not on track with your financial goals, then you must decide what habits or behaviors got you there and what changes you need to make to get yourself back on course. What leads to changes in behavior?

## Sticking to a Budget

By gaining greater insight into your relationship with money you can learn to master it, instead of the other way around. Who your money works for is up to you. For most people, money will always be a finite resource. Even if you get the raise or inherit a small fortune, without developing good money management skills, you can run the risk of coming up short for essentials.

While observation can sometimes unlock insight it may not be enough to change behavior forever. In addition to inspiration and reasoned thought, habits are formed by old fashioned effort and practice. Financial planning and management skills can be learned and if practiced faithfully can result in powerful and life long habits.

### 1. Personal Tool

A simple Microsoft excel spreadsheet is all you need to set up an individual expense worksheet.

Suggested categories include:

- Home: Potential categories include, mortgage, rent, utilities, internet, phone, supplies
- Car/Transportation: Insurance, license, maintenance, tags, parking
- Health: Insurance, medications, dental, vision, health club
- Food: Groceries
- Personal: Clothing, personal care products
- Leisure/Entertainment: Eating out, movies

### 2. Electronic Tool

Choose from four of the best free budget worksheets. You can select from online spreadsheets or download a template that can be used with Microsoft Excel or OpenOffice Calc. All can be edited to suit your budgeting needs. Options include:

- **Vertex42 Spreadsheets:** Lists over a dozen free budget spreadsheets that work with Microsoft Excel, and some are compatible with OpenOffice Calc or Google Docs as well. You'll find monthly and yearly household and personal budget spreadsheets, Christmas gift budget, business budget template, a wedding budget spreadsheet as well as a Money Manager Spreadsheet for Kids.
- **It's Your Money Budget Spreadsheets:** Lists seven free budgeting spreadsheets, including a Cash Flow Budget Spreadsheet inspired by Dave Ramsey's budgeting methods. Need to keep a budget by the week? Try the Box Budget Spreadsheet, which breaks down each month into four weeks. It's Your Money offers an assortment of free or low-cost personal money management spreadsheets.
- **PearBudget Free Budget Spreadsheet:** A free, comprehensive household monthly budget spreadsheet that is downloaded and used with Microsoft Excel any other Windows or Mac spreadsheet software that supports .XLS files. An analysis tab analyzes expenses by month and budget category, and shows the difference between actual and budgeted spending.
- **Google Docs Budget Spreadsheets:** Use the [Google Docs template gallery](#) (now officially called Google Drive) and enter one of these in the search box for some great options for budgets:
  - *Best-Personal-Budget-Planner:* A nicely done and very comprehensive budget spreadsheet with embedded spending and budget summary graphs.

- *Simple Budget Planner*: A more compact budgeting spreadsheet that lets you budget expenses by percentage of annual and monthly income, by Google.
- *Yearly Budget Template*: A detailed yearly and monthly budget tracking spreadsheet. This budget spreadsheet lets you project income and savings as well as keep a record of actual income and savings.

## J. Manage Your Health: Health Care Planners

It's a frequent complaint, "How can I be expected to keep up with all these medications?" It is not uncommon, especially as we get older to see a number of health care specialists. Having to keep up with frequent changes in medication names and dosage levels can be a real challenge. For individuals recently discharged from the hospital or those experiencing sensory motor or neurocognitive changes, it can be simply overwhelming. The unfortunate result can be inadvertent or inattentive mistakes in medication management.

You can begin to take control of your own health care goals by developing a few simple habits and practicing them on regular basis.

### 1. Personal Tool

#### Health Care Log Book

Communication is critical towards achieving improved health care. A health log book is a great tool to help you plan, organize, self-monitor and make adjustments in your health care goals. It can allow you to easily share medical information between you and your family, health care aides and doctors. Just as important, these key people in your life can communicate with each other to ensure your health care goals stay on track.

In a simple 3 ring binder and a 5 tab divider create a health care provider directory for key health care providers. A simple template can help structure your office visit ensuring you get questions answered and recommendations taken down correctly. In addition you should include appointment calendar and list of current medications in the health notebook. Finally make sure you bring the book with you to each appointment. The following information should be included in the health care notebook:

- **Appointment Calendar:** You are encouraged to keep all important appointments in ONE schedule book. Having numerous calendars and sticky notes is to be avoided. Whatever works for you, keep it simple and stay with it.
- **List of Current Medications:** It is important to take a list of your medications with you to each appointment with your doctor and to update the list of medications after every visit. Your doctor can quickly correct any miscommunication in type, frequency or dosage of medication. Other specialists can also see what you are taking to reduce the chance of medication side effects.
- **Provider Directory:** Although providers make an attempt to keep each other in the loop, it is to your advantage that your treatment team has updated, accurate and detailed medical information at their fingertips during each office visit.
- **Health Care Provider Notes:** You can develop a simple template to prepare for and take careful notes during your office visit.

- *Between office visits:* It is easy to forget changes in a particular symptom following an adjustment in medication or the onset of a new issue altogether. Be sure to take careful note of what you were feeling and when. This information can help guide your doctors' recommendations. Family and health care aides who may not be able to attend appointments are encouraged to write down questions and provide feedback as well. If a matter is not urgent, sometimes just by writing your observations down it will allow you to go on with your day. At your next scheduled appointment you can speak with your doctor in detail about your concern.
- *Preparation for appointment:* Your time with your doctor is limited. Before each appointment spend time prioritizing your concerns. Focus on 1 or 2 critical questions to ensure these issues are not overlooked.
- *Provider response:* Health care providers are encouraged to write down their response to questions. A written record can reduce the risk of miscommunication. Advice and recommendations can be reviewed at home as often as necessary.
- *Notes from office visit:* Consider having a family member or trusted health care provider attend all doctor visits with you. They can serve as a note taker as well as provide a balanced picture of your health status. Just like in class, taking notes allows you to easily retrieve your doctor's instructions at a later point. Remember working memory is reliably limited to 7 bits of information and can be stored for approximately 10 seconds before it is lost if not rehearsed or written down.
- *Change in medications:* Your physician is requested to write down all medication changes including the name, dosage level and frequency as well as any special instructions. Just as important, clarify why a medication was stopped or changed. Having a record of prior medications effectiveness or side effects can be very helpful if you change health care providers in the future.
- *Next appointment:* Before leaving the doctor's office, make sure you have a clear understanding of the treatment plan as well as what you're your role may be to ensure you meet your health care goal.
- **Data storage:** We keep detailed financial records every year. At tax time we take inventory and determine if we are on track with our financial goals. It makes sense that we should be just as careful about tracking the details of our medical health from year to year. You are encouraged to save prior Health Care Provider Notes and store them in a separate notebook at the end of each calendar year. Having a personal health care log book will allow you to monitor your medical issues and treatment outcomes more closely to guide health goals and habits for the next year.

## 2. Electronic Tools

Catering to the needs of the "sandwich" generation, or those harried family members trying to provide caregiving to their aging parents and children as well as work outside the home, there are a growing number of tools for the smartphone, the tablet and the laptop.

- **Balance:** Launched by the National Alzheimer Center in April 2013, the app also includes sections for caregiving tips, notes for the doctor and the patient's appointments, plus a "learning section"

with articles on aspects of Alzheimer's and an RSS feed for news about the disease. Pillbox is just one feature of a \$3.99 app which will organize all your medications and allow you to share with the information on the cloud with care providers and other relatives.

<https://itunes.apple.com/us/app/balance-for-alzheimers>

- **Comfort Zone** is a GPS tracking device, offered through the Alzheimer's Association that can monitor a loved one's whereabouts, allowing them to extend their independence and remain living safely in the home. The GPS device, starting at \$43 a month, sends a signal every five minutes allowing a spouse, family member or care provider the ability to go online and track exactly where their loved is based on 12 point coordinates on a map, revealing the patient's travels and sending an alert if he straying from a designated area [www.alz.org/comfortzone](http://www.alz.org/comfortzone)
- **CareFamily** offers a prescreening service for in-home caregivers and matches them to customers over the Internet. The service provides online tools that let a family remotely monitor a caregiver's attendance, provide reminders about medications and appointments, and exchange care plans and notes via email, texting or phone. <https://www.carefamily.com>