

Worksheet 3

Caregiver agreement checklist and timesheet

Goes with: Chapters 6 and 22

Pay to a family caregiver should rest on a written care agreement, ideally prepared by a lawyer. Use this sheet to gather the terms for the lawyer, then to record the hours and every payment.

Name

Date completed

A. The people

Senior receiving care

Caregiver

Caregiver also holds the enduring power of attorney? (yes or no)

Agreement start date

B. What the agreement should set out

Term	What we agreed
Duties	
Hours (per day or week)	
Hourly rate	
How time is recorded	
How payment is made from the senior's own account (by cheque or bank transfer, not cash)	
Employee or self-employed (checked with an adviser or a CRA CPP/EI ruling)	
Who approved the pay (the senior while capable, or someone independent)	
When the agreement is reviewed	
What happens on a move into care or at death	

C. Timesheet

[illegible]

D. Payments

Date paid	Amount	Method	Period covered	Receipt or slip

Checklist (Chapter 6)

- ☐ Any pay to a family caregiver is covered by a written agreement
- ☐ Timesheets and payments are recorded
- ☐ The senior's return claims attendant care where eligible
- ☐ The caregiver has checked the Canada and Alberta caregiver credits, and the 2027 change
- ☐ A caregiver leaving work has checked EI caregiving benefits
- ☐ The caregiver has a plan for breaks and knows how to arrange respite
- ☐ My own enduring power of attorney, personal directive and will name an alternate in case my spouse cannot act

If the caregiver later becomes executor (Chapter 22)

- ☐ Any wages owed to me are documented and disclosed
- ☐ Separate time records kept for the care I gave and the executor work I do