

PERSONAL PROFILE AND DOCUMENTATION GUIDE

A guide to track cognitive changes you see in yourself or a loved one.

ALZHEIMER'S  **ASSOCIATION®**

[alz.org](https://www.alz.org)

24/7 Helpline: 800.272.3900

Introduction

This **Documentation Guide** has been developed and provided by the Alzheimer's Association for those who have a need to record evidence of a person's declining ability to function on a job or in a daily life situation.

This **Guide** is not a substitute for diagnosis. A comprehensive assessment for Alzheimer's disease always includes a thorough medical evaluation. The information you record here will be helpful when you are asked about change in the patient. This information may be helpful when you meet with physicians, respite care program coordinators or other long-term care providers, as well as private insurance and Social Security Examiners reviewing for disability benefits.

- Examples of Changes in Abilities
- Social Security Disability Information
- A Personal Profile Form
- A Documentation Diary Form
- Medical History Form

This **Guide** has been designed to assist you in recording your observations and to provide concrete documentation of changes in the person's ability to function in their accustomed manner. To do so, you will need to 1) complete the Personal Profile and 2) periodically log, in diary fashion, specific behaviors which seem out of the ordinary or other than normal. Include dates of incidents as they occur. The **Documentation Diary** is a format for you to use; you may need to continue on additional paper.

Name _____

Diagnosis Date _____

Personal Profile date _____

Written by _____

Other disabilities (physical and sensory impairment – i.e., eyesight or hearing problems, diabetes, high blood pressure, etc.)

Social Security Disability Information

Social Security makes disability payments under two programs: 1) the Social Security Disability Insurance (SSDI) program; and 2) the Supplemental Security Income (SSI) program, which provides disability payments for people who have very low income and have not worked long enough to be eligible for SSI. For both programs, the medical and functional requirements for eligibility are the same. Decisions about whether a person meets the medical and functional eligibility requirements for SSDI and SSI are made by the Social Security Administration using many sources of information, including information from the person, the person's family, the person's doctor, and hospitals and other institutions that have provided care for the person. Completing the Personal Profile Form that follows can help you document changes in the person's functioning and ability to work. The Personal Profile Form is not a Social Security Administration form, but the completed form will be useful to you in talking with health care professionals and Social Security Administration staff who are involved in documenting and making decisions about the person's eligibility for disability payments.

The Social Security Administration also has pamphlets and representatives that can help you understand the eligibility requirements for SSDI and SSI and apply for disability payments. You may call toll-free, **1-800-772-1213** (TTY, 1-800-325-0778) or visit the Social Security Administration's website, **www.ssa.gov**.

If a person's application for disability payments is denied, they have a right to appeal that decision. Because of the way Alzheimer's disease and other diseases progress, the frequent uncertainty about date of onset, and other characteristics of these conditions, it may be difficult to determine whether the person is eligible, and disability applications may be wrongly denied. It is advisable to appeal such decisions. Professional advice about appealing a disability decision can be obtained from experienced attorneys. Your local chapter or the National Organization of Social Security Claimant's Representatives (1-800-431-2804) can be contacted for information or to direct you to an attorney who specializes in Social Security law.

Examples of Possible Changes in Function

The following are the ten most common warning signs of early-stage Alzheimer's disease or other dementias. Use these ten signs as a guide when looking for changes in a loved one's behavior or cognitive skills.

1. Memory loss that disrupts daily life.

One of the most common signs of Alzheimer's disease, especially in the early stage, is forgetting recently learned information. Others include forgetting important dates or events, asking for the same questions over and over, and increasingly needing to rely on memory aids (e.g., reminder notes or electronic devices) or family members for things they used to handle on their own.

What's a typical age-related change?

Sometimes forgetting names or appointments, but remembering them later.

2. Challenges in planning or solving problems.

Some people living with dementia may experience changes in their ability to develop and follow a plan or work with numbers. They may have trouble following a familiar recipe or keeping track of monthly bills. They may have difficulty concentrating and take much longer to do things than they did before.

What's a typical age-related change?

Making occasional errors when managing finances or household bills.

3. Difficulty completing familiar tasks.

People with Alzheimer's often find it hard to complete daily tasks. Sometimes they may have trouble driving to a familiar location, organizing a grocery list or remembering the rules of a favorite game.

What's a typical age-related change?

Occasionally needing help to use microwave settings or to record a TV show.

4. Confusion with time or place.

People living with Alzheimer's can lose track of dates, seasons and the passage of time. They may have trouble understanding something if it is not happening immediately. Sometimes they may forget where they are or how they got there.

What's a typical age-related change?

Getting confused about the day of the week but figuring it out later.

5. Trouble understanding visual images and spatial relationships.

For some people, having vision problems is a sign of Alzheimer's. This may lead to difficulty with balance or trouble reading. They may also have problems judging distance and determining color or contrast, causing issues with driving.

What's a typical age-related change?

Vision changes related to cataracts.

6. New problems with words in speaking or writing.

People living with Alzheimer's may have trouble following or joining a conversation. They may stop in the middle of a conversation and have no idea how to continue or they may repeat themselves. They may struggle with vocabulary, have trouble naming a familiar object or use the wrong name (e.g., calling a "watch" a "hand-clock").

What's a typical age-related change?

Sometimes having trouble finding the right word.

7. Misplacing things and losing the ability to retrace steps.

A person living with Alzheimer's disease may put things in unusual places. They may lose things and be unable to go back over their steps to find them again. He or she may accuse others of stealing, especially as the disease progresses.

What's a typical age-related change?

Misplacing things from time to time and retracing steps to find them.

8. Decreased or poor judgment.

Individuals may experience changes in judgment or decision-making. For example, they may use poor judgment when dealing with money or pay less attention to grooming or keeping themselves clean.

What's a typical age-related change?

Making a bad decision or mistake once in a while, like neglecting to change the oil in the car.

9. Withdrawal from work or social activities.

A person living with Alzheimer's disease may experience changes in the ability to hold or follow a conversation. As a result, he or she may withdraw from hobbies, social activities or other engagements. They may have trouble keeping up with a favorite team or activity.

What's a typical age-related change?

Sometimes feeling uninterested in family or social obligations.

10.Changes in mood and personality.

Individuals living with Alzheimer’s may experience mood and personality changes. They can become confused, suspicious, depressed, fearful or anxious. They may be easily upset at home, with friends or when out of their comfort zone.

What's a typical age-related change?

Developing very specific ways of doing things and becoming irritable when a routine is disrupted.

Personal Profile

This **Personal Profile** is designed to describe your patient when he or she was not ill. The categories queried are provided as a guide only, not all patients will experience changes in all these areas. It should also be noted that the order of these categories does not necessarily reflect the progression of the disease.

Describe the individual’s abilities and skills. Include details about the outlined functional abilities, answering the questions and giving examples to illustrate each area.

Memory

- a) What evidence can you give that the person had ability to remember important information?
- b) In what way were they able to recall well-learned information?

Orientation to Time

- a) How did the person show awareness of time, date and season?
- b) What were the person’s habits regarding appointments and deadlines?

Orientation to Place

- a) How did the person respond to orienting in various places, finding directions, etc.?
- b) How did the person adjust to changes in environments?

Judgment

- a) Give an example of the person's former ability to make choices and decisions.
- b) How did the person react to complex situations?
- c) In what ways did the person use appropriate judgment?
- d) Did the person have appropriate control of impulses (sexual, personal [such as toileting], buying and saving)?

Language

- a) Explain how the person was able to communicate effectively.
- b) What was the person's manner of talking (vocabulary, use of profanity, etc.)?
- c) Can you give evidence of the person's appropriate use of words and names?
- d) Was the person usually able to be understood?
- e) Can you tell about the person's ability to understand spoken communication?
- f) What were the person's language habits regarding repetition of words or phrases?

Capabilities and Activities of Daily Living

- a) What were patterns of daily routine, including sleep, eating and other daily habits?
- b) Describe the person's former natural dress and grooming.
- c) What characterized their personal manners (courtesy, politeness, table manners, etc.)?
- d) What were the person's reading habits, writing skills (including creativeness, spelling, handwriting) and mathematics skills?

- e) Describe their problem-solving skills. Was there appropriate understanding of tasks?
- f) What was the person's intellectual ability? Include sources of measured tests (SAT, LSAT, GRE, etc.), if applicable.
- g) What were the person's interests, business experience activities and educational achievements?

Sociability

- a) How would you describe the person's personality?
- b) What were the person's relationships with other people like? Did they have many friends? Did they often send letter, make phone calls or interact on social media?
- c) How would you characterize the person's sense of independence?

Expression of Feelings

- a) How did the person tend to handle or express their feelings?
- b) Indicate whether the person was prone to emotional outbursts (anger, crying, anxiety, etc.).
- c) Describe if the person had dramatic mood changes or disturbances.

Thinking

- a) Show how the person had the ability to concentrate, plan and think things through.
- b) Describe how the person was able to fulfill required roles.

Medical History

Current illnesses, diseases, injuries, etc.:

_____	Date	_____
_____	Date	_____
_____	Date	_____
_____	Date	_____
_____	Date	_____

Medication, food or other allergies or sensitivities:

Physicians/Medical Care Team:

Name _____ Date of last visit _____

Location _____

Name _____ Date of last visit _____

Location _____

Name _____ Date of last visit _____

Location _____

Name _____ Date of last visit _____

Location _____

Current Medications (including non-prescription drugs and supplements):

Medication Name	Dosage	Pill Color (if applicable)	When/How it's taken

Documentation Diary Form

Briefly describe events that indicate a change in function, impairment of abilities and retained abilities. Using this diary will help you convince your loved one that there has been a noticeable change in their cognitive ability and will help their doctor make an accurate diagnosis.

Date

Date

Date

Date

Date

Date

Date

Date

Date

Date

Date

Date

Date

Please continue this diary on your own paper, or reprint this template to make more entries.