



Care Plan Assessment

This guide will assist you and your family in creating and implementing a care plan to ensure that your loved one's needs are met.

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Having “The Talk”

Many elders tend to avoid discussing their care needs and future plans with their family members. Although broaching the subject of creating a care plan can be challenging, this is a crucial first step for successful aging *and* caregiving.

Establishing a realistic and comprehensive care plan can help ensure your loved one’s independence and wellbeing while also allowing you to build respite and outside support into your regular routine. Without structure and assistance from friends, family and elder care professionals, caregivers leave themselves vulnerable to damaging caregiver burnout.

Family members often wonder when to become involved in a loved one’s daily life and care. Adult children typically discuss their parents’ health and living situation amongst themselves until an unforeseen event causes them to take action. However, this is not the best way to broach the subject with elders or prepare yourself for managing someone else’s health, finances and daily care.

It is **never** too early to begin discussions regarding long-term care and plans for the future with aging parents, siblings, or a spouse. If you meet with any opposition when trying to introduce these matters, make sure your loved one understands that creating a care plan is for their personal benefit as well as your own peace of mind.

To begin this dialogue, gather any family members who wish to participate in executing the resulting care plan. Begin a frank discussion that is void of judgement with the sole purpose of contributing to your loved one’s prolonged security and quality of life.

Beyond the Caregiving Plan

The process of devising a care plan highlights a loved one’s wishes and priorities for the future and addresses the practicable ways in which these desires can be honored. Since this care plan revolves around your loved one, they should be able to participate as much as possible. Listen to their goals and concerns and take them seriously. After all, you are sitting down to create a tentative roadmap for their future! Shouldn’t they have some say in it?

Although it can be difficult to begin this conversation, a loved one will usually open up about their preferences if you begin by sharing your own. Here are some initial questions to help you start the conversation and get a better understanding of your loved one's priorities:

- Are there any activities or hobbies you would like to pursue or continue?
- Is socializing with friends and family important to you?
- Would you like to travel?
- Do you want to remain at home as long as possible? If so, would you hire in-home care at some point?
- Would you want someone in the family to be your full-time caregiver?
- How do you feel about moving to Assisted Living or a Nursing Home?
- What are your values and beliefs regarding your quality of life and longevity?
- Do you have a living will, advance directive or Do Not Resuscitate (DNR) order in place?
- In case someone needs to make medical decisions on your behalf, who would you feel most comfortable appointing? What about financial decisions?
- Have you designated someone as a medical and/or financial Power of Attorney (POA)?
- What are your wishes for final arrangements once you are gone?

Caregiver to Caregiver

The following are tips on how to have “The Talk” from fellow caregivers in the AgingCare.com [online support groups](#).

“With my folks I played the ‘just in case something happens to you’ card and was able to get Power Of Attorney and access to their accounts. Three years later, I take care of all the bills and finances because they are no longer able.”

—Windyridge

“My husband and I found that ‘the talk’ with my parents went better when we talked about OUR plans to write out our will, etc. This helped them to accept the fact that they had to face these important issues.”

—anne123

“The family is going to meet a couple of hours before we head over to my mother-in-law’s. We have also discussed the option of hiring home care to help with medication management, unplugging the stove, laundry and other things my mother-in-law is not doing. We know that she is not taking showers, but at this time we are not going to push this issue.”

—dlynn

“I asked my 3 siblings to meet me for dinner. I was very clear and direct about the situation; how I needed their help and the ways they could help. Well, I think my 2 older siblings forgot why we met. I had several heart to heart talks with my younger sibling. I told him that I was so glad to have him in my life. He had been so supportive.”

—IMPKL

“I would break up ‘the talk’ into several small sessions. If not, your loved one may be overwhelmed. If you are organized and know what you need to ask, you can gather the information informally. Of course, if your loved one wants to forge ahead, gather as much as they are willing to share. Just take it in phases.”

—MiaMadre

The Care Team

Creating and implementing an effective family caregiving plan must include the input and support of your loved one, family members, friends and elder care professionals. The entire team should be involved in putting this plan in place. All team members do not necessarily need to be present for the initial meeting, but having an elder care professional participate may help to convince a resistant loved one that it is time to address their current and future needs.

Members of the care team may include:

- Family
- Friends and neighbors
- Home care and home health care professionals
- Adult day care
- Geriatric care managers
- Elder law attorneys
- Social workers
- Physicians (primary care physician and specialists)
- Financial planners

Caregiver to Caregiver

The following are tips on forming a care team from fellow caregivers in the AgingCare.com [online support groups](#).

“The most important thing that I have learned as a family caregiver is never stop reaching out for help and advice from family members, professional caregivers, medical people, friends and neighbors. I've found that most people want to help and that I sometimes need to let go of expectations about what their help will look like.”

—Despr8caregiver

“A geriatric case manager RN saved my mom's life, probably more than once. I was 4,000 miles away and Mom was in a nursing home. The case manager saw to it that the level of care was good and that the facility treated her properly. When the facility moved Mom to a different floor where there was no activity or events, the case manager insisted she be allowed to participate in activities to increase her strength. She also caught medication issues. Expensive, but very worth it.”

—Sophe509

“My best advice is try first for family, but if you get no support, go to home health and try to find one or two caregivers who click with your loved one. It can take some time, but when it happens, your loved one is not only happier, but you also have some time to yourself.”

—Kuli

“We switched to a geriatric physician who also sees patients of all ages. I love him. He is thorough, listens to Mom, listens to me, and is careful about using extreme methods on elderly patients. He even suggested a change in her medications that no one else took the time to investigate.”

—anonymous13319

The Care Assessment

After assembling your care team, assess the needs of your loved one. Each member of the team should contribute to this evaluation and agree on each step on the planning process. This assessment should cover all aspects of your loved one's living environment, daily care routine, medical care, legal documents and finances.

Home Safety Assessment

Ensuring your loved one's safety within their living space is crucial to their prolonged health and happiness. Use these checklists to assess the safety and suitability of your loved one's home.

ENTRY WAY	OK	NEED
Well-lit at night		
Safe steps and secure railing		
Ability to see visitors prior to entry		
Door lock(s) and doorbell in working order		
Extra set of keys available with family or neighbors		

Notes:

ALL ROOMS	OK	NEED
Rugs with no-slip mats and secured corners		
Uncluttered walkways		
Sufficient lighting		
Carbon monoxide detector		
Smoke detectors in each room with new batteries		
Stairs free of clutter with secure handrails		

Notes:

KITCHEN	OK	NEED
Faucets and sink disposal working		
Stove burners and oven working		
Refrigerator and freezer working		
Cooking utensils, pots and plates are easily accessible		
Small appliances are working with safe cords		
Are automatic shut-off features or alarm reminders needed?		

Notes:

BEDROOM	OK	NEED
Phone by bedside with emergency numbers		
Easily accessible lighting by bedside and at room entrance		
Clearly lit path to the restroom at night		
Nightstand for personal items and a flashlight		

Notes:

BATHROOM	OK	NEED
Shower/tub – Safety mats and grab bars		
No-slip mats outside of shower/tub		
Shower chair		
Shower head working		

Notes:

Health Care Assessment

Professional home care agencies assess each client's needs by evaluating their ability to perform activities of daily living (ADLs), which are basic self-care tasks. Instrumental activities of daily living (IADLs) are more complex tasks that an individual must be able to perform in order to live independently. Use these checklists to assess your loved one's daily care needs.

ACTIVITIES OF DAILY LIVING	NO ASSISTANCE	SOME ASSISTANCE	TOTAL ASSISTANCE
Bathing			
Dressing			
Eating			
Transfer between bed and wheelchair			
Continence (bladder control)			
Toileting			

Notes:

INSTRUMENTAL ACTIVITIES OF DAILY LIVING	NO ASSISTANCE	SOME ASSISTANCE	TOTAL ASSISTANCE
Managing medications			
Preparing meals			
Housekeeping and laundry			
Managing finances			
Shopping (groceries, essentials)			
Handling transportation			

Notes:

Daily Care Schedule

Outline a daily schedule for home care professionals, family members and friends to follow in order to provide daily care that best resembles your loved one's preferred routine.

	ACTIVITY	TIME	RESPONSIBLE
MON			
TUES			
WED			
THR			

	ACTIVITY	TIME	RESPONSIBLE
FRI			
SAT			
SUN			

Notes:

Medical and Legal Documents Assessment

It is important to obtain the following documents well before an emergency occurs. Members of the care team should also know where these files are kept.

DOCUMENT	YES	NO	LOCATION
Living Will			
Will			
Power of Attorney for Health Care			
Power of Attorney for Finances			
Durable Power of Attorney			
Advance Health Care Directive			
Do Not Resuscitate (DNR) Order			
HIPAA Authorization			
Health-Care Proxy			
Living Trust			
Funeral Planning Documents			

Notes:

Financial Assessment

Discussing finances is uncomfortable for most people, but it is important to understand your loved one's financial situation in order to be able to manage their affairs efficiently and accurately when the time comes. Getting a full picture of their situation will also help you know what type of elder care the family will be able afford in the future and how to budget accordingly.

ASSETS, DEBTS & PAYING FOR CARE	ASSET TOTAL	DEBT TOTAL	USEFUL TO PAY FOR CARE (YES/NO)
Checking/Savings			
Social Security			
Certificates of Deposit (CDs)			
401(k) or 403(b)			
Individual Retirement Account (IRA)			
Pension			
Home Loan			
Real Estate			
Trusts			
Personal Loans			
Credit Card Debt			
Federal and State Taxes			
Veterans Assistance			
Medical Insurance			
Medical Out-of-Pocket			
Medicare			
Life Insurance Policy			
Long-term Care Insurance			
Stocks			
Bonds			
Mutual Funds			
Annuities			

Notes:

(Financial Assessment Continued)

HOUSING EXPENSES	AMOUNT DUE	MONTHLY, QUARTERLY, YEARLY
Rent/Mortgage		
Senior Housing		
Homeowners Insurance		
HOA Fees		
Property Taxes		
Property Insurance		
Power		
Cable		
Gas		
Phone		
Garbage Service		
Home Repairs		
Lawn Care		
Pet Care		
Housekeeping		

Notes:

(Financial Assessment Continued)

TRANSPORTATION EXPENSES	AMOUNT	MONTHLY, QUARTERLY, YEARLY
Auto Loan		
Auto Insurance		
Auto Maintenance		
Public Transportation, Car Service or Taxi		
Parking Fees		

Notes:

PERSONAL CARE EXPENSES	AMOUNT	MONTHLY, QUARTERLY, YEARLY
In-Home Care		
Groceries		
Salon/Barber		
Toiletries		

Notes:

HEALTHCARE EXPENSES	AMOUNT	MONTHLY, QUARTERLY, YEARLY
Health Insurance Bills		
Prescriptions		
Durable Medical Equipment (hospital bed, oxygen, I-V equipment, lift chair, etc.)		
Disposable Medical Supplies		

Notes:

OTHER EXPENSES	AMOUNT	MONTHLY, QUARTERLY, YEARLY
Clothing		
Charitable Contributions		
Entertainment		
Gifts		
Vacation/Travel		

Notes:

Contact Information

List the contact information for family members, friends, medical professionals (home care agencies and caregivers, physicians), financial professionals (CPA, financial planner), attorneys and insurance contacts.

Company Name _____

Name of Contact _____

Phone Number _____

Acct. / Policy Number _____

Company Name _____

Name of Contact _____

Phone Number _____

Acct. / Policy Number _____

Company Name _____

Name of Contact _____

Phone Number _____

Acct. / Policy Number _____

Company Name _____

Name of Contact _____

Phone Number _____

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Notes:

Helpful Resources for You and Your Family

Our goal is to provide families with the information and resources they need to care for their loved ones so they can enjoy their time together more and worry less. As an advocate for the family caregiver, all of our services are provided at no cost to you.

HOME CARE SERVICES	<p>FIND HOME CARE</p> <p>Our Home Care Referral Program assists families in finding in-home care services. A care advisor will assess your needs and assist in arranging free in-home consultations with local agencies.</p> <p><i>Speak with a Care Advisor 1 (888) 495-8727</i></p>
SENIOR HOUSING SERVICES	<p>FIND SENIOR HOUSING</p> <p>Senior housing includes Assisted Living, Independent Living and Memory Care Communities. Have a care advisor provide you with pricing information, availability and a list of services for communities in your area.</p> <p><i>Speak with a Care Advisor 1 (888) 848-5698</i></p>
ONLINE SUPPORT GROUPS	<p>VIEW ALL SUPPORT GROUPS</p> <p>Get answers and support from other family caregivers and elder care experts in online Support Groups that address a wide variety of caregiving, elder health and financial topics.</p>
FUNERAL PLANNING GUIDE	<p>FREE FUNERAL PLANNING GUIDE</p> <p>Download a funeral planning guide and locate funeral homes and cemeteries in your area to help you arrange the final tribute for your loved one or yourself.</p>