

Creating a Care Plan

The First Step in Successful Caregiving



Create and implement an elder care plan to ensure your loved one's daily needs are met.

AgingCare

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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 well-being while also allowing you to build respite care and outside support into your regular routine. Without structure and assistance from friends, family and elder care professionals, caregivers leave themselves vulnerable to 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.

When it comes to long-term care and planning for the future, it is never too early to begin discussions with aging parents, siblings or a spouse. If you meet with any resistance 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 conversation that is void of judgement with the sole purpose of contributing to your loved one's prolonged security and quality of life.

Understanding a Senior's Lifestyle and Preferences

The process of devising a care plan highlights a loved one's wishes and priorities for the future and addresses the practical 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 creating a tentative roadmap for their future! Shouldn't

they have some say in it?

Although it can be difficult to start 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 kick off the discussion and get a better understanding of your loved one's priorities:

- Do you have any activities or hobbies you would like to continue doing? Are there any new ones you'd like to pursue?
- Is socializing with friends and family important to you?
- Would you like to travel?
- Do you want to remain in your own home for as long as possible? If so, would you consider hiring 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 an assisted living community 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 named someone as your medical and/or financial power of attorney (POA)?
- What are your wishes for final arrangements once you are gone?

Caregiver-to-Caregiver Advice

Fellow caregivers have shared the following tips for starting “the talk” in AgingCare's [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 their 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 discussed OUR plans to write out our wills, etc. This helped them to accept the fact that they had to face these important issues.”

—anne123

“Parents often wait for a crisis to happen before they’ll act. Stating that YOU want to be prepared can help. Say something like, ‘I know I’ve mentioned the idea of planning for what you’ll do if the time comes when you need help. I understand that you don’t want to make decisions right now, but you should make a plan for someday. If you don’t, and an accident or illness happens, I’ll be the one who must choose where you’ll go and how you’ll live. If you plan now, those decisions will be yours to make.’ If that doesn’t work, tell them you’re going to make your own preparations. Sadly, it’s often all about the slant you put on things when dealing with parents who are afraid, irrational or in denial.”

—IsntEasy

“I asked my siblings to meet me for dinner to discuss our parents’ care. I was very clear and direct about the situation, how I needed their help and the ways they could pitch in. I think two of my siblings forgot why we met, but I’ve had several heart-to-heart talks with my younger brother since then. He’s been so supportive.”

—IMPKL

“I would break up ‘the talk’ into several small sessions. If not, your loved one may become overwhelmed. Of course, if they want to forge ahead, gather as much as they are willing to share. Just take it in phases.”

—MiaMadre

Forming a Care Team

You need the input and support of your loved one, your family members, your friends and elder care professionals to create and implement an efficient care plan. 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 convince a resistant loved one that it is time to address their current and future needs.

Members of the care team may include:

- Family members
- Friends and neighbors
- Home care and home health care professionals
- Adult day care centers
- Geriatric Care Managers (also known as Aging Life Care Professionals)
- Elder law attorneys
- Social workers
- Physicians (primary care and specialists)
- Financial planners
- Members of local community or religious groups

Caregiver-to-Caregiver Advice

Fellow caregivers have shared the following tips for forming a care team in AgingCare's [online support groups](#).

“The most important thing that I have learned as a family caregiver is to never stop reaching out for help and advice from family members, professional caregivers, medical professionals, 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 Care 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 care manager ensured that the level of care was good and the facility treated Mom properly. When Mom was moved to a different floor where there was no activity or events, the care manager insisted she be allowed to participate in activities to increase her strength. She also caught medication issues. The service was expensive but very worth it.”

—Sophe509

“My best advice is to seek support from family first. If you get nothing, look for a home care company 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 geriatrician 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 treatment methods on elderly patients. He even suggested a change in her medications that no one else took the time to investigate.”

—anonymous13319

Conducting a Care Assessment

After assembling your care team, it's important to evaluate your loved one's abilities and needs. 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 for their prolonged independence, health and happiness. Use these checklists to assess the safety and suitability of your loved one's home.

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

All Rooms	OK	Need
Any rugs have non-slip backings/mats and secured corners		
Uncluttered walkways		
Sufficient lighting		
Carbon monoxide detectors		
Smoke detectors		
Stairs free of clutter with secure handrails		
Notes:		

Kitchen	OK	Need
Functioning faucets and sink disposal		
Functioning stove burners and oven		
Functioning refrigerator and freezer		
Easily accessible utensils, cookware and dishes		
Undamaged electrical cords on small appliances		
Automatic shut-off features/alarm reminders		
Notes:		

Bedroom	OK	Need
Phone by bedside		
Emergency contact list by bedside		
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
Non-slip mat inside shower/tub		
Non-slip mat outside shower/tub		
Grab bars inside and outside shower/tub		
Shower chair/transfer bench		
Functioning faucets		
Functioning shower head		
Toilet seat riser		
Notes:		

Functional Assessment

When creating a personalized care plan, elder care providers determine a senior'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 abilities and the level of care they require.

Activities of Daily Living	No Assistance	Some Assistance	Total Assistance
Bathing and personal hygiene			
Dressing			
Eating			
Mobility and transferring			
Toileting and continence			
Notes:			

Instrumental Activities of Daily Living	No Assistance	Some Assistance	Total Assistance
Managing medications			
Planning and preparing meals			
Housekeeping and laundry			
Managing personal finances			
Shopping (groceries, clothing, etc.)			
Transportation (driving, public transit, etc.)			
Communicating via phone, text message, email, etc.			
Notes:			

Daily Care Schedule

Use this chart to outline a daily schedule that best resembles your loved one's preferred routine. Home care professionals, family members and friends can use this itinerary to easily reference what a loved one is doing at certain times of the day/week and to assign caregiving responsibilities

	Activity	Time	Caregiver Responsible
Mon			
Tues			
Wed			
Thurs			
Fri			
Sat			
Sun			

Notes:

Medical and Legal Documents Checklist

It's important to obtain the following documents well before an emergency occurs. Members of the elder's care team should also know where these files are kept. Be aware that some of these documents do overlap. For example, some advance directives combine both a living will and a health care proxy (also known as a durable power of attorney for health care). Instead of focusing on checking off all items on this list, verify that you are adequately prepared for all hypothetical medical, legal and financial situations that may arise. A reputable elder law attorney can help you determine if any documents must be changed or added to your loved one's files to ensure their needs are met and their wishes are respected.

Document	Have (Location)	Need	N/A
HIPAA release form			
Power of attorney for health care			
Power of attorney for finances			
Letter of competency			
Advance health care directive			
Living will			
Health care proxy			
Do-not-resuscitate (DNR) order			
POLST form			
Living trust			
Last will and testament			
Funeral planning documents			
Notes:			

Financial Assessment

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

Investments/Assets	Total
Checking account	
Savings account	
Certificates of deposit (CDs)	
401(k) or 403(b)	
Profit-sharing plan	
Individual retirement account (IRA)	
Pension	
Real estate	
Trusts	
Life insurance cash value	
Securities (stocks, bonds, Treasuries)	
Mutual funds	
Annuities	
Other	

Debt	Total
Home loan	
Personal loans	
Credit card debt	
Auto loan	
Other	

Income Sources	Amount	Frequency (weekly, monthly, etc.)
Part-time/full-time employment		
Social Security payments		
Investment income, dividends, withdrawals		
Annuity income		
Real estate income		
Inheritance		
Trust withdrawals		
Pension benefits		
401(k)/IRA distributions		
Veterans pension		
Other		

Notes:

Housing Expenses	Amount	Frequency (monthly, quarterly, annually, etc.)
Mortgage/rent		
Homeowners/renters insurance		
HOA fees		
Property taxes		
Property insurance		
Electric bill		
Water bill		
Cable bill		
Internet bill		
Gas bill		
Phone bill		
Garbage service		
Home repairs		
Lawn care		
Pet care		
Housekeeping		
Other		

Notes:

Transportation Expenses	Amount	Frequency (monthly, quarterly, annually, etc.)
Car payment		
Auto insurance premiums		
Auto maintenance		
Fuel		
Public transportation, car service, taxis, etc.		
Parking fees		
Other		
Notes:		

Personal Expenses	Amount	Frequency (monthly, quarterly, annually, etc.)
Groceries		
Salon/barber		
Toiletries		
Other		
Notes:		

Health Care Expenses	Amount	Frequency (monthly, quarterly, annually, etc.)
Health insurance/Medicare premiums		
Medical co-payments		
Out-of-pocket medical expenses		
Dental insurance premiums		
Dental co-payments		
Prescriptions		
Long-term care insurance premiums		
Durable medical equipment (hospital bed, oxygen, IV equipment, lift chair, etc.)		
Disposable medical supplies (incontinence supplies, gloves, etc.)		
In-home care		
Adult day care		
Other		

Other Expenses	Amount	Frequency (monthly, quarterly, annually, etc.)
Clothing		
Charitable contributions		
Entertainment/recreation		
Gifts to relatives/friends		
Vacation/travel		
Life insurance premiums		
Federal and state taxes		
Other		

Notes:

Contact Information Reference Sheet

List the contact information for family members, friends, doctors, respite care providers (home care agencies, caregivers, etc.), financial professionals (CPA, financial advisor), 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 _____

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Notes:

Helpful Resources for You & 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.



Find Home Care

www.agingcare.com/local/in-home-care

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. **Speak with a care advisor at 1 (888) 887-4593.**

Find Senior Housing

www.agingcare.com/local/senior-living

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. **Speak with a care advisor at 1 (888) 848-5698.**

Support Groups

www.agingcare.com/caregiver-forum

Get answers and support from other family caregivers and elder care experts in online Support Groups that address each of these topics:

Alzheimer's & Dementia

Diabetes

New to Caregiving

Caregiver Burnout

Grief Support

Parkinson's Disease

Depression

Incontinence Care

Veterans Assistance

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