Eldercare Family Checklist

A quick reference guide and checklist that family members can refer to in order to plan ahead as parents age and as families move through various stages of caregiving and eldercare.

Preparing Ahead
Encourage your loved one to meet with a financial advisor and estate planning/elder law attorney. Know who your loved one’s advisors are and encourage open communication.
Execute important legal documents such as: Durable Power of Attorney, Healthcare Surrogate/POA, Living Will, Will/Trust.
Know the location of important papers—see our “document locator list”.
Ask if your loved one has thought about what they would like to do if assistance is needed (educate yourself on basic options/costs, consider family situation and realistic alternatives). Discuss expectations and what is realistic.
Open up the lines of communication: the more discussions can begin prior to crisis, the better. It helps if you have basic understanding of the financial situation and talking regularly can alert you to concerns and encourage discussion.
Offer assistance with areas in which your loved one feels comfortable letting you help. Consider hiring a home caregiver to help with household tasks, transportation, meal preparation and other needs.

First Signs
See “Am I in Denial?” handout for signs to watch for in your loved one.
Other potential red flags to watch for: your parent takes multiple medications or visits several medical specialists, recent hospitalizations, falls or injuries, confusion/memory loss, difficulty with financial management or excessive concerns regarding finances.
Try to ensure family visits regularly and/or hire a professional geriatric care manager to do spot checks if you cannot be there.
Watch carefully for concerns regarding proper handling of medications.
Have a home safety assessment/evaluation of resources to maintain independence.
Begin keeping a health record by creating a file or using an online system to maintain basic records, medical contacts, records of surgery or interventions (consider attending key medical appointments or hiring a patient advocate to do so).
Research potential assistance in the area—know key numbers and what might be available now and in future.
Get contact information for key professionals (attorney, tax advisor, financial advisor, doctors), friends and neighbors and make contacts where possible. Attend meetings and establish relationships with these professionals as your loved one allows. These relationships can “multiply your eyes and ears” and ensure professionals have the permission to contact you with concerns.
Have a family meeting or conference call to discuss concerns, duties and how to approach the situation.
Offer assistance with items such as financial management—bill paying, Medicare/insurance, coordinating medical appointments or engage professionals where needed.
Begin a more in depth look at resources and discussion regarding options.

Deteriorating Health/Crisis
Call on trusted professionals and ask them about resources.
Hire a geriatric care manager to do a professional assessment, which can assist with the following:
>> Understanding your loved one’s income and asset picture and how this will affect care options/resources. Do they have sufficient income stream to pay for care at home/up until what point?
Can they afford privately paying for care facilities? What are costs in local area? If limited resources, what public benefits are available and how do they intersect with needs? How scarce are public benefits?
What planning can be done? What does their various insurance cover?
>>> Understanding care options and levels of care.
>>> Putting monitoring systems into place and managing medical concerns and care.
Take advantage of windows of opportunity (parent has a fall, becomes hospitalized, brings up a concern or need for help with a task—these are key times to discuss wishes, look at options, and bring in help).

**Is it Time for a Move?**
Has it become too difficult to manage at home?
Have your parents been scammed or become particularly vulnerable or easily influenced by others?
Is the care needed to stay safe at home too costly?
Could your loved one benefit from the socialization of a group environment? Is your loved one isolated or relegated to contact primarily with care providers?
Understand what is available to help in home/community based services so you will know when those options are no longer enough or inappropriate. Similarly, understand the levels of care and settings available in facilities.
Consider the emotions involved and what the best approach might be. Confer with siblings and ensure you are on the same page first.
Know the reality: have you or your loved one visited a retirement community? Put aside past prejudices by seeing what is to offer today in your area.
Consider professional assistance in choosing the right facility. A care manager can pinpoint options that are appropriate, save you a lot of time and frustration, give you the background on the quality and levels of care provided, and help coordinate the process.
Other resources that may be needed: moving company, estate sales, realtor, junk removal, storage unit, appraiser, cleaning service, home staging company, property manager, attorney, etc.

**As Things Progress**
Revisit your loved one’s wishes and take a step back to consider them as decisions need to be made.
Confer with medical professionals on prognosis, treatment options, and expected results. Ask questions and prepare ahead for appointments. Make sure the medical specialists are the right fit.
Take time to process emotions, care for yourself, share memories, and be with family.
Keep in mind quality of life and its meaning to your loved one. Don’t overlook small things: the comfort of favorite pajamas, the dignity of having a nice hairdo, a homemade treat or favorite drink or meal, a book or newspaper, or someone acknowledging the person’s memories and accomplishments.
Inquire about options such as hospice and palliative care. Educate yourself and talk to medical professionals about options, even if they do not raise them.
Take some time to work on organizing and simplifying, to cut down on the stress of dealing with financial and estate matters during caregiving and after death.
Ensure funeral arrangements have been made or you have at least talked to your loved ones about their wishes.

Read more: [http://www.agingwisely.com/eldercare-family-checklist/#ixzz2vbRb1ePS](http://www.agingwisely.com/eldercare-family-checklist/#ixzz2vbRb1ePS)