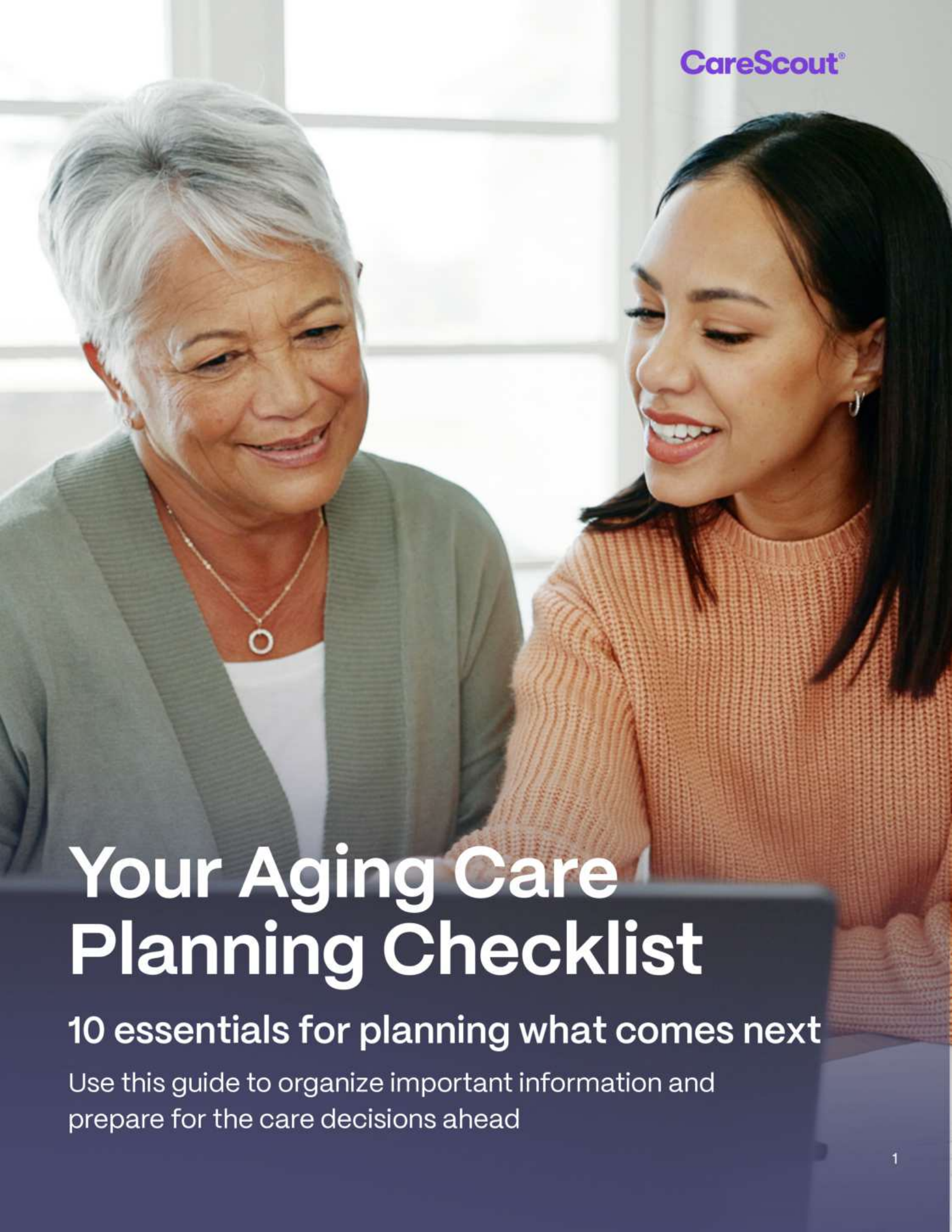
CareScout®



Your Aging Care Planning Checklist

10 essentials for planning what comes next

Use this guide to organize important information and prepare for the care decisions ahead

01

Document some details and then learn about your — or your loved one's — illness, condition, or disease.



Note any of the following:

Immediate care needs
(e.g. walker or medical bed)

Immediate safety risks
(e.g. tripping or fire hazards)

Potential longer-term safety risks
(e.g. driving or wandering)

Special skills needed to care for you or your loved sone, such as being bilingual

For guidance on addressing these, talk to your health care provider(s) and or caregivers, and review websites, articles, or books you trust.

02

Identify any activities that require assistance. These typically fall into two categories:



Basic Activities of Daily Living:

- ◯ Eating
- ◯ Bathing and showering
- ◯ Transferring (getting in and out of a bed or chair)
- ◯ Continence (e.g. the ability to control bladder and bowel function)
- ◯ Toileting

Instrumental Activities of Daily Living, which require more complex thinking skills, including organizational skills:

- ◯ Managing finances
- ◯ Managing transportation (driving, etc.)
- ◯ Shopping and meal preparation
- ◯ Housecleaning and home maintenance
- ◯ Managing communication (phone or email)
- ◯ Managing medications

03

Record any specific preferences for care and daily activities.



Favorite foods and ideal mealtimes

Preferred types of clothing

Favorite activities

Preferred times to go to bed and wake up

Bedtime

Wake Time

Preferred time(s) to bathe or shower

Other preferences

04

Once you've established your care circle, note the role for each person or provider and what they're helping with.



Name	Role	Contact Information

05

If you're caring for someone else, take stock of your own health and well-being



Write down any physical, mental, emotional, or social health concerns.

Talk to your doctor about any physical or mental concerns you've noted.

Share your feelings with supportive people you trust, or even just one person: a friend, close family member, mental health counselor, or spiritual advisor (e.g. clergy).

Consider joining a support group. There are many online groups and resources in addition to local support groups that meet in person. Ask your Area Agency on Aging about options.

06

Organize important care information in one central location, such as a logbook or spreadsheet.



- All health care professionals' names and contact information
- Medical names of all diagnoses
- Medications: full names, prescription numbers, dosages, and safety information
- Copies of health insurance and long-term care insurance information
- HIPAA authorization forms and any other documentation allowing caregivers to share information
- Medical care planning documentation, such as Medical Orders for Life Sustaining Treatment (MOLST)

07

Create an emergency plan.

- Compile a list of emergency phone numbers, such as police, fire, and ambulence/EMT.
- Obtain an ID bracelet or Personal Emergency Response Systems (PERS) button if needed.
- Make a list of people who can step in during an emergency or unplanned absence of the regular caregiver(s).
- If there are pets, arrange for how they'll be cared for.

08

Plan for the future, legally and financially.



- ○ Think ahead and plan for how care needs may change over time based on the expected progression of any health condition.
- ○ Assess the state of your finances by speaking with a financial professional or elder law attorney familiar with aging care issues, including Medicaid eligibility and estate/end-of-life planning.
- ○ Talk to an estate planning or elder law attorney, or a legal aide, about a health care proxy, direct power of attorney (DPOA), living will, and do-not-resuscitate instructions.
- ○ Ensure required documents are in order and address any gaps.

09

Identify any additional services you might like to consider.

- ○ Home care options (e.g. blocks of care, overnight, private pay, or state-funded)
- ○ Alternate living options (assisted living, memory care, or long-term nursing care)
- ○ Caregiver education for specific medical issues or how to provide care
- ○ Caregiver coaching programs
- ○ Laundry
- ○ Cleaning
- ○ Respite care
- ○ Adult day health programs/day centers
- ○ Home-delivered meals
- ○ Memory cafes

10

If you're caring for someone else, practice self-care, too.



- ○ Take care of your own health with good nutrition, restful sleep, and regular physical activity.
- ○ Find out if your employer offers employee assistance benefits for family caregivers.
- ○ Let go of some nonessential commitments. No one can do it all.
- ○ Continue to do things that bring you joy.
- ○ Take regular breaks from caregiving.
- ○ Let your support group support you.

You can do this!

No one should have to travel the aging care journey alone. As you work through this list, you'll find that there are many people and resources that can make it easier for you.

Remember that one of the most important pieces of planning is planning to be helped. This guide is a great start at getting the support you need.

Have questions? Call us for help connecting to care at (855) 885-6612, Monday - Friday, 8:30am - 6pm ET.

For more research, information, and guides, check out CareScout.com/Resources