

Issues to Review



Checklist for Families

In order to properly assist and care for an elderly patient or relative, organization is key. Every family and every situation is different—with different issues, problems and challenges. Take stock of what the family needs to do, and make a checklist. Use this list as you design a care plan. It is also a good idea to refer back to it as time goes on.

MEDICAL

- What medical conditions does the elder have?
- What are the typical symptoms and effects of this condition or these conditions?
- What is the recommended treatment?
- What is the prognosis for the future?
- What kind of caregiving is most appropriate for the medical situation?
- What are the names and phone numbers of your elder's doctor(s)?

FINANCIAL

- What financial means are available to pay for care or for other necessities?
- What outside or governmental help is available to help cover costs?
- Do you need a financial planner to help organize financial matters?
- Will family members have to cover any costs from their own pockets?

LEGAL

- Are all of the legal documents—wills, powers of attorney, living wills or trusts—in order?
- Do you know where they are located?
- Do you know who your elder's attorney is?

ACCESS

- Do you have keys to your elder's house and car?
- Do you have phone numbers for doctors, attorneys and other professionals?
- Could you locate and have access to important information in a crisis?

DAILY CARE

- What daily care needs does your elder have—personal care, housekeeping, home health care, or other assistance?
- When is this care most needed?
- Who will be providing this care?
- How are these care needs likely to change?

LONG-TERM PLANS

- What are your plans for the future?
- What will you do if there is a crisis?
- What are the likely changes in care needs in the future?

CAREGIVERS

- Who will be providing care?
- Will family members provide all of the care?
- Will outside caregivers or home care agencies be hired?

PROFESSIONAL HELP

- Do you need a geriatric care worker to help manage the day-to-day care of your relative?
- What social workers, therapists or other professionals are available to help?

TRANSPORTATION

- How will your elder get around?
- What transportation services are available in your community?
- Which of these transportation services are appropriate for your elder?
- Which family members are available to provide transportation, and when?