

UPWARD CARE DEVELOPING THE CARE PLAN

Start the conversation with your loved one by reviewing goals and prioritizes. It is also important to begin identifying family and friends that can assist in the care journey.

CARE RECIPIENT:

FAMILY AND FRIENDS:

GOALS

- To remain healthy and active
- To stay/ move near family
- To remain in your own home for as long as possible
- To stay active with religious or community groups
- To maintain hobbies
- To be around people
- Move to a residence with support services
- Move to a more accessible home
- To be financially secure and/or to budget for future needs
- To travel and enjoy retirement
- Manage quality of life and comfort
- Other

NOTES AND FOLLOW UP ITEMS

GENERAL NEEDS ASSESSMENT

Identify the areas your loved one may need assistance and then assign a person that can take on that responsibility.

AREA OF NEED

TYPES OF TASKS

POINT PERSON

Home Maintenance

Living Situation

- Pay rent/mortgage
- Home repairs/ modification
- Ongoing maintenance
- Safety concerns
- Grocery shopping
- Meal Preparation
- Lawn care
- Pet care
- Housekeeping
- Research alt. living situations
- Other:_____

Financial Affairs

- Paying Bills
- Keeping track of the budget
- Managing Assets
- Applying for benefits (medicaide)
- Taxes
- Other:_____

Transportation Needs

- Driving decisions
- Coordinating Rides
- Locating Transportation Serv.
- Managing Insurance
- Other:_____

Personal Care

- Getting in/out of bed
- Help with dressing/ grooming
- Bathing / Showering
- Incontinence
- Other:_____

GENERAL NEEDS ASSESSMENT

AREA OF NEED

TYPES OF TASKS

POINT PERSON

Healthcare

- Monitor and record symptoms
- Arrange medical appointments
- Attend medical appointments
- Submit medical insurance/ bills
- Explain medical decisions
- Medication Mgmt
- Perform medical tasks
- Obtain medical bracelet
- Fall prevention
- Mental health professional
- Obtain medical equipment
- Other: _____

Communication

- Keep family informed
- Coordinate caregivers (family/ professional)
- Daily check-ins
- Help with cell phone
- Help with email / computer
- Other: _____

Socialization

- Arranging for visitors
- Coordinating outings
- Membership at senior center
- Assist with use of social media
- Other: _____

Legal

- Update Will
- Designate Power of Attorney (medical & durable)
- Advance Directives
- Create / Manage trust
- Other: _____
