

Beginning Planning Worksheet

Identify Needs

Issues of Concern	Where to Start	Contact/Follow Up
Specific health conditions	<ul style="list-style-type: none"> ○ Condition specific organizations, websites ○ Ask physician's office for information ○ 	
Medications	<ul style="list-style-type: none"> ○ Updated list of all medications taken (prescription and over the counter) ○ Contact info for all pharmacies used ○ Medication dispensers or reminders ○ Prescription drug coverage ○ 	
Medical Information	<ul style="list-style-type: none"> ○ Names/contact info for all providers ○ Health Care Power of Attorney ○ Insurance information (Medicare, supplemental, long term care) ○ 	
Memory loss issues, confusion, paranoia	<ul style="list-style-type: none"> ○ Comprehensive Evaluation ○ Medication review ○ Check for acute medical problems ○ Alzheimer's Association ○ Safe Return bracelet ○ Bill paying programs ○ Adult day programs ○ 	
Hearing and Vision Problems	<ul style="list-style-type: none"> ○ Regular evaluations for changes ○ Home adaptations ○ Appropriate use of hearing and visual aids ○ 	
Concern about falls, history of falls	<ul style="list-style-type: none"> ○ Safety inspection of home by occupational therapist ○ Matter of Balance classes ○ Evaluation by physical therapist ○ 	

Personal Assistance	<ul style="list-style-type: none"> ○ Benefits Check Up ○ In home assistance, homemaking ○ Evaluation by occupational therapist ○ 	
Home Safety	<ul style="list-style-type: none"> ○ Home Safety Check-list ○ Home modifications ○ Emergency Response system ○ Emergency cell phone ○ 	
Concerns about driving	<ul style="list-style-type: none"> ○ Mature driver class (AAA, AARP) ○ Alternative transportation ○ Licensure reporting procedure - BMV ○ Driver Evaluation Program: New England Rehab Hospital, Alpha One ○ 	
Socialization	<ul style="list-style-type: none"> ○ Friendly visitor ○ Senior dining site ○ Community programs ○ Senior Centers ○ Volunteer opportunities at SMAA ○ 	

Starting the Conversation

- Start the conversation before a crisis happens.
- Do your homework first. Learn about options.
- Use struggles and solutions of friends, family, neighbors as examples to open a topic and voice concerns.
- Listen well to others' concerns. Respect their opinions even if you disagree.
- Be collaborative. Brainstorm and negotiate.
- Discuss options before help is needed whenever possible.
- Start with the basics:
 - What do people think is the need for care?
 - Are papers in order? (Power of Attorney, insurance, will)
 - What is most important if a crisis should arise?
 - What help seems reasonable?
 - Who might provide help?
 - If a person has to give up driving, what are the transportation options?

- Stay positive and be patient.
- Decide on a balance between safety and independence. What can be safely done on one's own?
- Hold a family meeting with all those involved.
- Put all plans in writing. Agree to review plans regularly to evaluate how they're working.

Helpful Caregiver Resources

- **Southern Maine Agency on Aging**, 1-800-427-7411, www.smaaa.org, offers information and referral for programs and services for older adults, community education, the Family Caregiver Support Program, on line caregiver support group, volunteer opportunities, assist with money management, Meals on Wheels, and an adult day program.
- **Elders1**, 1-877-353-3771 (1-877-ELDERS1), www.caregivinginmaine.org is the statewide toll free connection to the Agency on Aging that serves your area.
- **Maine Office of Elder Services**, 1-800-262-2232, www.maine.gov/dhs/oes is responsible for developing and overseeing many services for older adults in Maine. They offer assistance in finding sources for care, identifying benefit programs, and learning about resources.
- **Centers for Medicare and Medicaid Services (CMS)**, 1-800-MEDICARE, www.medicare.gov, provides an overview of Medicare and Medicaid policy and regulations, and consumer literature about health-related services and benefits.
- **Administration on Aging**, www.aoa.gov, is the government agency concerned with issues affecting older Americans. This site offers information about older Americans, legislation, and programs.
- **Eldercare Locator**, 1-800-677-1116, www.eldercare.gov, can help you to find local services for older adults anywhere in the US.
- **National Institutes on Aging**, 301-496-1752, www.nia.nih.gov, offers valuable health and resource information for consumers and professionals.
- **Maine Alzheimer's Association**, 1-800-272-3900, www.alz.org/maine, offers support, resources and education for people with any type of dementia and those who care about them. Their toll-free number is available 24/7.
- **Legal Services for the Elderly**, 1-800-750-5353, www.mainelse.org, provides free legal assistance to socially and economically needy Maine residents age 60 and older.