



## EFFECTIVE PLANNING ACTION CHECKLIST

### Chapter 1 of *The Complete Eldercare Planner*

#### A PLACE TO START

#### To Do By

#### Completed

#### *Set planning goals*

short-term \_\_\_\_\_

long-term \_\_\_\_\_

#### *Create a system for duplicating and filing*

eldercare information \_\_\_\_\_

notes \_\_\_\_\_

questions \_\_\_\_\_

goals \_\_\_\_\_

lists \_\_\_\_\_

documents \_\_\_\_\_

phone numbers \_\_\_\_\_

agreements \_\_\_\_\_

*Have access to*

telephone \_\_\_\_\_

transportation \_\_\_\_\_

copy machine \_\_\_\_\_

fax \_\_\_\_\_

Internet \_\_\_\_\_

e-mail \_\_\_\_\_

post office \_\_\_\_\_

public library \_\_\_\_\_

*Review Communicaring chapter* \_\_\_\_\_

*Review eldercare resources* \_\_\_\_\_

*Create a backup plan* \_\_\_\_\_

*Attend community eldercare programs* \_\_\_\_\_

**CAUGHT OFF GUARD: SUDDENLY, YOU'RE A CAREGIVER**

***Get organized***

review table of contents \_\_\_\_\_

prioritize issues \_\_\_\_\_

start a file on elder \_\_\_\_\_

locate documents \_\_\_\_\_

store originals in safe place \_\_\_\_\_

***Take notes***

names and addresses \_\_\_\_\_

telephone numbers \_\_\_\_\_

plans \_\_\_\_\_

instructions \_\_\_\_\_

directions \_\_\_\_\_

decisions \_\_\_\_\_

promises \_\_\_\_\_

***Get community telephone books***

Blue Pages \_\_\_\_\_

White Pages \_\_\_\_\_

Yellow Pages \_\_\_\_\_

***Create a helpers list***

family \_\_\_\_\_

friends \_\_\_\_\_

neighbors \_\_\_\_\_

co-workers \_\_\_\_\_

church members \_\_\_\_\_

volunteers \_\_\_\_\_

***Make a list of help needed*** \_\_\_\_\_

***Request and accept help*** \_\_\_\_\_

***Create a list of eldercare advisers*** \_\_\_\_\_

***Access eldercare experts***

hospital discharge planner \_\_\_\_\_

local agency on aging \_\_\_\_\_

geriatric case manager \_\_\_\_\_

***Make informed decisions***

questions answered to satisfaction \_\_\_\_\_

time allowed for research \_\_\_\_\_

costs investigated \_\_\_\_\_

references checked \_\_\_\_\_

legal counsel sought for contracts, signatures, financial investments \_\_\_\_\_

family discussions ongoing \_\_\_\_\_

elder involved in decisions \_\_\_\_\_

*Use the Decision-Making Worksheet to help in the process* \_\_\_\_\_