



GERIATRIC CASE MANAGER CHECKLIST Chapter 2 of *The Complete Eldercare Planner*

Today's Date _____

Name of Case Manager _____

Contact Information _____

Ask the following questions when interviewing Geriatric Case Managers:

What is your educational background?

What medical and/or educational degrees do you hold?

Where did you work prior to entering private practice? For how many years?

How long have you been in business?

Is this a full-time or part-time practice?

Are you certified by the state?

What are your hours and availability in an emergency?

What are your emergency backup plans if you're unavailable?

Who supervises your work?

How much do you charge for an initial assessment?

What is your hourly fee?

What can I expect to pay? What is your billing cycle?

Which services are arranged outside of your care?

What is your role once a referral is made?

How, and how often, will you update me?

May I have the name of three references who have used your service?