

Heritage Residents Questions

Taxes who can help with preparing taxes. When a resident can't find all their information or when hope that they can still do their taxes but they no they longer can, then what should they do?

- A. Call a friend or family
- B. Call HR Block or another firm (do you have name of firms)
- C. How to find a tax preparer or accountant they can trust

Accountant:

- A. Keeping track of all bills and pay them
 - 1. Who does this
 - a. Family or friend
 - 1. They can set up online accounts (need a class)
 - b. Are there Accountants who already help residents and can they take on new clients

Health Care Problems

- A. Mental or Physical
- B. Heritage staff will step in and contact family or health care agent
- C. Heritage staff will care for resident _____how much per day?
- D. Resident must pay for other companionship.
 - 1, How will resident pay for this companionship
 - a. Do nothing and have no companionship
 - b. Take out LTC insurance policy (advice for LTC)
 - 1. Need names of good LTC insurance agents
 - c. Have sufficient money in bank or house and pay cash
 - d. Home Instead is now used. Name of other care firms.
- E. Continuing Care
 - 1. Skilled Nursing Cost. Please list for Schedule C residents
 - 2. Assisted Living Cost Please list for Schedule C residents

Medical Advocate

- A. Hospital. When someone is taken to the hospital they might wish to have a medical advocate.
 - 1. Names of Advocates
- B. When someone goes to doctors office and needs someone to write notes about what was discussed and their treatment plan. A medical advocate can do that. Do you have names of medical advocates?
- C. Residents could have a form that they can hand to their doctor during their physical visit. Doctor can list visit concerns and give form to patient who can then can give to Heritage staff.

