

Advance Care Planning Review for Caregivers

If the person you care for has already completed advance medical, legal, and financial planning for his or her care, your Care Team Navigator (CTN) would be happy to review these plans with you. Please read the list below to see if there is anything you might want to talk with your CTN about.

Medical Planning

Choosing an Agent:

- ☐ The person I care for has chosen someone (a health care agent) to make medical decisions for them when he/she is no longer able to do so. The person they chose to be their agent is named in one of these documents:
 - Durable Power of Attorney for Health Care
 - Advance Health Care Directive

The person named in this document knows they have this responsibility and they are still willing and able to fulfill this role.

OR

- ☐ The person I care for has a guardian/conservator that the judge said could make medical decisions on his/her behalf.

If none of the above are true, or you are not sure, see the “Planning for Health Care Decisions” handout and talk to your CTN.

Letting Others Know What the Person You Care for Would Want:

- ☐ The person I care for has a document that describes the kind of medical care they would or would not want when they can no longer make medical decisions for themselves.
 - This document is called one of the following: Advance Directive, Living Will, POLST/IPOST, DNR, Care Ecosystem Goals of Care.
 - The wishes in the document still reflect the wishes of the patient I care for.
- ☐ The health care agent or guardian/conservator knows about these wishes and has a copy of this document.
- ☐ The health care agent or guardian/conservator is aware of what happens in the later stages of dementia and the kinds of medical decisions that may need to be made on behalf of the person I care for.
- ☐ The wishes in this document were discussed with the person’s primary care doctor and others involved in his/her care.

If none of the above are true, or you are not sure, see the handouts called “Planning for Health Care Decisions” and “Advanced Dementia: A Guide for Families.” You can also talk to your CTN.

Financial and Legal Planning

Choosing a Fiduciary:

- ☐ The person I care for chose someone to make financial decisions (a fiduciary) when he/she is no longer able to do so. This person is named in either or both of these documents:
 - A Durable Power of Attorney for Finances
 - A Living Trust

The person chosen in this document knows they have this responsibility and is willing and able to fulfill this role.

OR

- ☐ The person I care for has a guardian/conservator that the judge said could make financial decisions.
The guardian/conservator understands which decisions he/she can and cannot make on behalf of the person you care for.

If any of the above is not true, or you are not sure, see the handout called “Who Can Make Financial Decisions for the Person I Care For?” and talk to your CTN.

Social Security Benefits and Representative Payees:

- ☐ The person I care for receives Social Security benefits and has a Representative Payee who was appointed by the Social Security Administration.
- ☐ The Representative Payee understands the decisions they can and cannot make for the person I care for.

If the person you care for receives Social Security benefits and either of the above is not true, talk to your CTN.

Veterans Benefits and VA Fiduciaries:

- ☐ The person I care for receives Veterans benefits and has a VA Fiduciary who was appointed by the Veterans Administration.
- ☐ The VA Fiduciary understands the decisions they can and cannot make for the person I care for.

If the person you care for receives Veterans benefits and either of the above is not true, talk to your CTN.

Planning to Pay for Future Care Needs:

- ☐ The person I care for has made legal and financial plans for his or her future long term care needs, including where they might live if they can no longer live at home and how to pay for it.
- ☐ The fiduciary for the person I care for understands these plans and is willing and able to carry them out.

If either of the above is not true, or you are not sure, talk to your CTN.