

ElderKit™





Table of Contents

1. Introduction

The Fannie Mae ElderKit™	1
Using the ElderKit Effectively	2
Fannie Mae's Commitment to Eldercare.....	3

2. Eldercare Planning Guide

Medical Information	5
Personal and Family Information.....	10
Financial and Banking Information.....	13
Personal Property.....	25
Legal and Estate Information	28
Funeral Arrangements	29

3. Tools for Caregivers

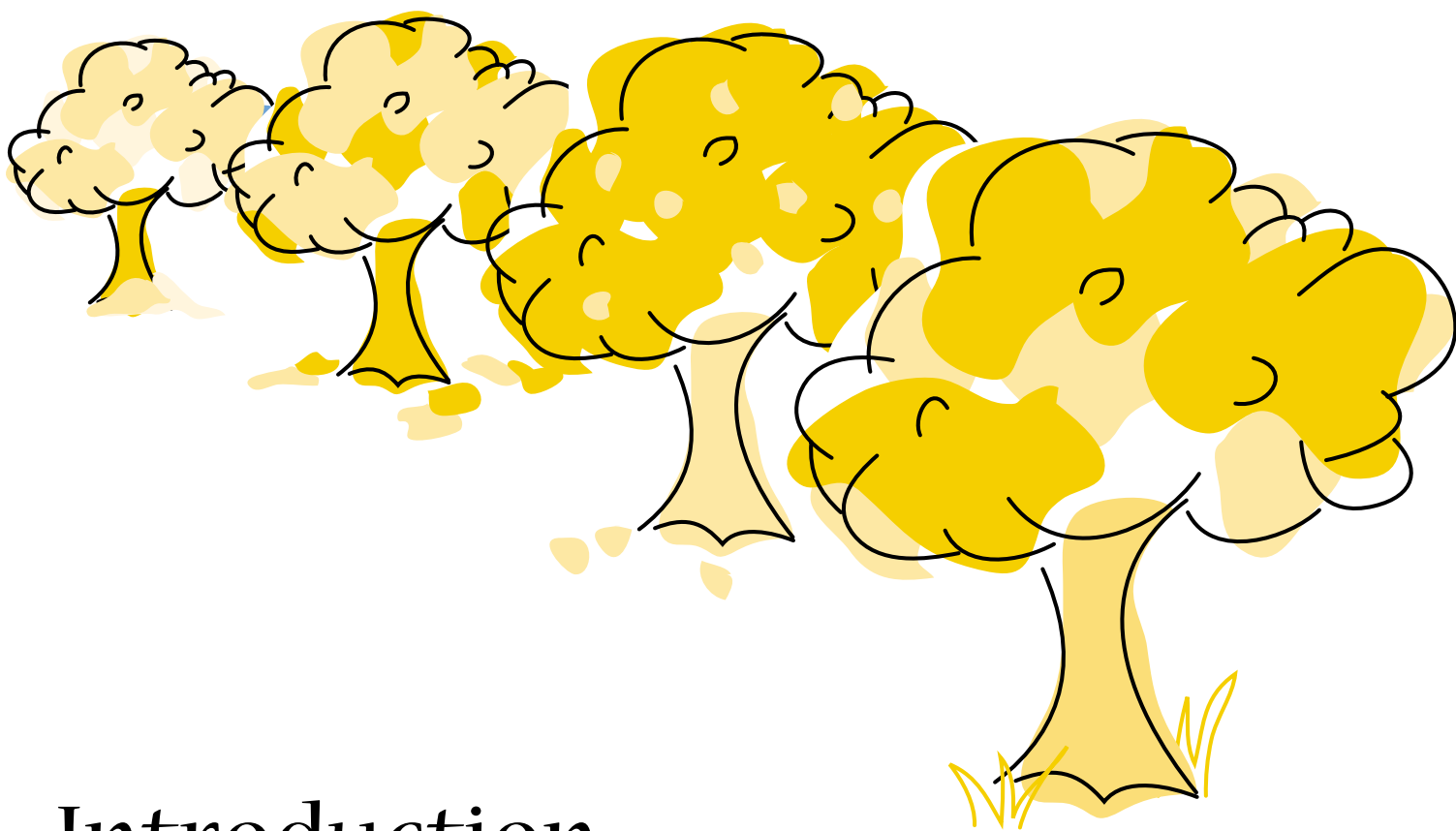
Document Locator	30
Emergency Contact List	32
Daily Schedule and Events	34
Daily Medication Log	36
Health Care Provider Communications Log.....	37
Pet Information and Instructions.....	38
Important Dates to Remember	39
Useful Websites.....	40

4. Glossary of Eldercare Terms

5. Eldercare Bibliography

6. Important Documents

Recent Photograph of Elder.....	49
Copy of Elder's Health Insurance Cards.....	50
Copy of Elder's Health Care Proxy/Living Will.....	51



Introduction



The Fannie Mae ElderKit™

Introduction

Fannie Mae has created the ElderKit as a convenient way for you to record and maintain information about your older relative's personal and medical concerns. Once you've reviewed the materials we've included and "filled in the blanks," the ElderKit will help you . . .

- **Assess your older relative's finances.**
The toolkit contains a template to help you summarize your older relative's financial assets and liabilities. Other forms will help you record the location of important documents so you don't need to search for them during an emergency or crisis.
- **Help doctors and other health care professionals.**
The information in this toolkit can provide health care workers with a snapshot of your older relative's medical history and current condition. You'll also learn what information to furnish health care providers so they can develop a thorough and effective plan of care.
- **Make sure your family members are informed and prepared.**
The toolkit will be a valuable guide to you and your family in the event of an older relative's incapacity. Knowing your older relative's financial, legal, and medical status will help every caregiver, and aid the individual responsible for the estate.



Using the ElderKit Effectively

Introduction

The ElderKit has been designed to provide plenty of basic information while allowing room for you to add certain documents and details specific to your particular eldercare situation. You'll probably need to invest several hours gathering and recording all of the necessary information, and that may include some time making phone calls or searching for documents that have been filed away or long forgotten (see section three, "Document Locator"). In many cases, you may not be able to locate certain documents, but it's important to record as much accurate data as possible, and add other documentation as it becomes available. You may even want to use a pencil to record information you anticipate may change in the future, such as account values and phone numbers. Also, feel free to copy pages from the toolkit if you need additional space for information.

During the process of collecting the information, you may come upon some issues you and your loved ones haven't already considered, and you may be faced with some decisions as well. If so, take some notes, write down some of your concerns, meet with fellow family members, and try to tend to these issues promptly.

It's a good idea to fill the toolkit with copies of documents, then return the originals to a safe, secure place. We also recommend an annual review of the financial, legal, and medical records included in the toolkit. And you should insert a current photo of your elder from time to time as well. This is especially useful in cases where an older relative may become disoriented and wander away from home.

Once you've assembled most of the information, remember to provide the exact location of the ElderKit to those who may need to refer to it. You might even consider giving close relatives or other caregivers their own copies.

We recognize that the toolkit won't provide all the answers to the questions that may arise in the coming months and years, and that's why our eldercare consultant is always nearby. But the time you spend using this toolkit can produce major rewards for your family and beneficiaries, aiding every caregiver and preventing unnecessary difficulties later.



Fannie Mae's Commitment to Eldercare

Introduction

The guiding principle behind Fannie Mae's benefits is to support employees through every stage of work and life. And often that means providing the support and guidance you need to help your loved ones progress through stages of their own lives. The fact is that for many people, the challenges of raising children come to an end only to be replaced by concerns over aging parents and relatives. And sometimes we're faced with both responsibilities at the same time. That's why our cutting-edge, dependent care program was expanded to address eldercare issues. The following benefits have been designed to help you navigate your way through the difficult challenge ahead.

Fannie Mae On-Site Eldercare Consultant

Employees who are anticipating or currently experiencing difficulty related to the support or care for an elderly parent or relative may contact our geriatric social worker for assistance with understanding the complex issues surrounding caregiving and the eldercare system. Individualized counseling, coordination of services, and assistance with direct care providers can be arranged in person, by email, or by phone.

LifeWorks™

Choosing a caregiver or nursing home for your elderly relative can be a daunting task. Fortunately, employees can obtain information on various issues surrounding such care by calling LifeWorks, 24 hours a day, or by connecting to the Service's Web site at www.lifeworks.com.

Employees can receive information, counseling, and referrals to a wide range of programs and services including adult day care, senior centers, home health care agencies, transportation, and health issues. The service is confidential and provided at no cost to you. Here is a sample of available eldercare topics and resources:

Paying for Care:

Medicare
Medicaid
Prescription Drug Coverage
Supplemental Insurance
Social Security/SSI

Living Arrangements:

Assisted Living
Continuing Care Facilities
Nursing Homes
Shared Housing
Subsidized Housing

(continued)



Fannie Mae's Commitment to Eldercare (continued)

Caregiver Resources:

Care Planning/Legal Issues
Financial Considerations
Caregiver Support Groups
Home Care Services
Chore Services
Adult Day Care
Home Delivered Meals
Transportation
Funeral Planning
Grief and Loss

Senior Health:

Alzheimer's
Fitness/Nutrition
Rehabilitation Services
Hospitalization
Vision and Hearing
Physical Changes
Cognitive Changes

Safety for Seniors:

Home Safety
Assistive Devices
Emergency Response Systems

Eldercare Seminar Series

There's plenty to learn about the impact of caring for elders, and few of us have the knowledge going in. So Fannie Mae has scheduled seminars throughout the year to address many topics specific to eldercare. These may include legal concerns, financial planning, the Medicare System, care for the caregiver, medical issues, housing, and more. Please check the Health and Work/Life Center Calendar of Events for the schedule of seminars.

Lending Library

Books, tapes, and articles on aging and caregiving are available from the Health and Work/Life Center. Materials may be borrowed by employees for a period of two weeks.

The impact of caring for an elder goes beyond their direct care, and Fannie Mae has plenty of other benefits available to employees that can be helpful during this lifestage.

- Work/Life Center Calendar of Events to sign up for on-site programs of interest.
- Long-Term Care coverage for your parents or parents-in-law.
- Health Care Tax-Saver Spending Account to save on taxes and health care costs.
- Dependent Care Tax-Saver Spending Account to save on taxes and dependent care costs.
- Purchased vacation days for more time off.
- Group Legal Plan to assist with estate planning and other legal matters.
- Dependent Care Voucher Program for emergency dependent care needs.
- Resource and Referral Service for additional information on eldercare resources in the community.
- Employee Assistance Program (EAP) for professional help to assist with the stress of caregiving.
- Flexible Work Options (FWO) to tailor a work schedule to meet specific time needs.
- Family Sick Leave to take time off to care for an older adult.



Eldercare Planning Guide



Eldercare Planning Guide

Table of Contents

- Elder's Medical Information
- Elder's Personal and Family Information
- Elder's Financial and Banking Information
- Elder's Personal Property
- Elder's Wills and Trusts
- Elder's Funeral Arrangements
- Document Locator

Medical Information



Medical Information



General Information

Medical Information

Name of Elder _____

Address _____

Telephone _____

Date of Birth _____

Social Security Number _____

Medicare # _____

Medicaid # _____

Medigap (Carrier and Number) _____

Long Term Care Insurance (Carrier and Number) _____

Other Insurance (Carrier and Number) _____

Blood Type _____

Allergies _____

Emergency Contact _____

Address _____

Telephone _____

Primary Caregiver _____

Address _____

Telephone _____

Name of Health Care Proxy _____

Address _____

Telephone _____

Is a Do Not Resuscitate Order in effect? Yes No



Current Medications

Medical Information

List all prescription and non-prescription medications, dosages, and prescribing physician. Bring this list to all medical appointments and notify each doctor of current medications.

Medication _____ Purpose _____
Prescribing Physician _____
Dosage _____ Date Prescription Expires _____
Special Instructions _____

Medication _____ Purpose _____
Prescribing Physician _____
Dosage _____ Date Prescription Expires _____
Special Instructions _____

Medication _____ Purpose _____
Prescribing Physician _____
Dosage _____ Date Prescription Expires _____
Special Instructions _____

Medication _____ Purpose _____
Prescribing Physician _____
Dosage _____ Date Prescription Expires _____
Special Instructions _____

Medication _____ Purpose _____
Prescribing Physician _____
Dosage _____ Date Prescription Expires _____
Special Instructions _____

Medication _____ Purpose _____
Prescribing Physician _____
Dosage _____ Date Prescription Expires _____
Special Instructions _____



Health Care Providers

Medical Information

Include elder's primary care physician, specialists, social workers, physical therapists, visiting nurses, home care aides, and HMO's, etc.

Name _____ Specialty _____

Address _____

Telephone _____

Name _____ Specialty _____

Address _____

Telephone _____

Name _____ Specialty _____

Address _____

Telephone _____

Name _____ Specialty _____

Address _____

Telephone _____

Name _____ Specialty _____

Address _____

Telephone _____

Name _____ Specialty _____

Address _____

Telephone _____

Name _____ Specialty _____

Address _____

Telephone _____



Current Medical Diagnoses

Medical Information

Diagnosis _____

Date of Onset _____

Treating Physician _____

Treatment Plan _____

Diagnosis _____

Date of Onset _____

Treating Physician _____

Treatment Plan _____

Diagnosis _____

Date of Onset _____

Treating Physician _____

Treatment Plan _____

Diagnosis _____

Date of Onset _____

Treating Physician _____

Treatment Plan _____

Diagnosis _____

Date of Onset _____

Treating Physician _____

Treatment Plan _____

Diagnosis _____

Date of Onset _____

Treating Physician _____

Treatment Plan _____



Prior Surgeries and Hospitalizations

Medical Information

Diagnosis _____

Date of Onset _____

Treating Physician _____

Procedure/Treatment Plan _____

Diagnosis _____

Date of Onset _____

Treating Physician _____

Procedure/Treatment Plan _____

Diagnosis _____

Date of Onset _____

Treating Physician _____

Procedure/Treatment Plan _____

Diagnosis _____

Date of Onset _____

Treating Physician _____

Procedure/Treatment Plan _____

Diagnosis _____

Date of Onset _____

Treating Physician _____

Procedure/Treatment Plan _____

Diagnosis _____

Date of Onset _____

Treating Physician _____

Procedure/Treatment Plan _____

Personal and Family Information



Personal and Family Information



Personal Information

Personal and Family Information

Legal Name of Elder _____

Nickname _____

Maiden Name (if applicable) _____ Telephone _____

Address _____

Date of Birth _____ Place of Birth _____

Religion _____ Social Security Number _____

Current Marital Status _____

Date and Place of Marriage _____

Spouse's Name _____

Nickname _____

Spouse's Address _____

Telephone _____

Date of Birth _____ Place of Birth _____

Religion _____ Social Security Number _____

Elder's Father's Name _____

Father's Birthdate _____ Father's Place of Birth _____

Father's Date of Death _____ Father's Burial Site _____

Elder's Mother's Name _____

Mother's Birthdate _____ Mother's Place of Birth _____

Mother's Date of Death _____ Mother's Burial Site _____



Family Information

Personal and Family Information

Name(s), Address(es), and Phone Number(s) of Elder's Children

Name(s), Address(es), and Phone Number(s) of Elder's Siblings

Name(s), Address(es), and Phone Number(s) of Elder's Nieces and Nephews

Name(s), Address(es), and Phone Number(s) of other Relatives (Indicate Relationship to Elder)



Employment History

Personal and Family Information

Present or Last Employer _____

Employer's Address _____

Pension or Benefits Office Phone Number _____

Location of Pension or Annuity Papers _____

Date of Hire _____ Date of Termination _____

Starting Salary _____ Salary at Termination _____

Previous Employer _____

Employer's Address _____

Pension or Benefits Office Phone Number _____

Location of Pension or Annuity Papers _____

Date of Hire _____ Date of Termination _____

Starting Salary _____ Salary at Termination _____

Previous Employer _____

Employer's Address _____

Pension or Benefits Office Phone Number _____

Location of Pension or Annuity Papers _____

Date of Hire _____ Date of Termination _____

Starting Salary _____ Salary at Termination _____

Military Service:

Branch of Service _____

Military ID Number _____

Last Military Rank _____

Dates of Service _____

Location of Discharge Papers _____

Banking and Financial Information





Financial and Banking: Important Contacts

Financial and Banking Information

Name of Financial Advisor/Accountant _____

Name of Firm _____

Firm's Address _____

Telephone _____

Name of Investment Broker _____

Name of Firm _____

Firm's Address _____

Telephone _____

Name of Income Tax Preparer _____

Name of Firm _____

Firm's Address _____

Telephone _____

Name of Attorney _____

Name of Firm _____

Firm's Address _____

Telephone _____

Name of Power Attorney (Finances) _____

Name of Firm _____

Firm's Address _____

Telephone _____



Checking and Money Market Accounts

Financial and Banking Information

Account in Name of _____

Bank Name and Address _____

Type of Account _____

Account Number _____

Name of Banker _____

Account in Name of _____

Bank Name and Address _____

Type of Account _____

Account Number _____

Name of Banker _____

Account in Name of _____

Bank Name and Address _____

Type of Account _____

Account Number _____

Name of Banker _____

Account in Name of _____

Bank Name and Address _____

Type of Account _____

Account Number _____

Name of Banker _____

Account in Name of _____

Bank Name and Address _____

Type of Account _____

Account Number _____

Name of Banker _____



Savings Accounts

Financial and Banking Information

Account in Name of _____

Bank Name and Address _____

Type of Account _____

Account Name _____

Name of Banker _____

Account in Name of _____

Bank Name and Address _____

Type of Account _____

Account Name _____

Name of Banker _____

Account in Name of _____

Bank Name and Address _____

Type of Account _____

Account Name _____

Name of Banker _____

Account in Name of _____

Bank Name and Address _____

Type of Account _____

Account Name _____

Name of Banker _____

Account in Name of _____

Bank Name and Address _____

Type of Account _____

Account Name _____

Name of Banker _____



Individual Retirement Accounts

Financial and Banking Information

Account in Name of _____
Type of Account _____ Account Number _____
Name of Institution _____ Telephone _____
Address _____
Date Acct. Opened _____ Interest Rate _____
Maturity Date _____ Original Deposit Amount _____

Account in Name of _____
Type of Account _____ Account Number _____
Name of Institution _____ Telephone _____
Address _____
Date Acct. Opened _____ Interest Rate _____
Maturity Date _____ Original Deposit Amount _____

Account in Name of _____
Type of Account _____ Account Number _____
Name of Institution _____ Telephone _____
Address _____
Date Acct. Opened _____ Interest Rate _____
Maturity Date _____ Original Deposit Amount _____

Account in Name of _____
Type of Account _____ Account Number _____
Name of Institution _____ Telephone _____
Address _____
Date Acct. Opened _____ Interest Rate _____
Maturity Date _____ Original Deposit Amount _____



Insurance

Financial and Banking Information

Type of Policy _____

Name of Agent _____ Agent's Telephone _____

Name of Insurance Company _____

Agency or Insurance Company's Address _____

Type of Policy _____

Name of Agent _____ Agent's Telephone _____

Name of Insurance Company _____

Agency or Insurance Company's Address _____

Type of Policy _____

Name of Agent _____ Agent's Telephone _____

Name of Insurance Company _____

Agency or Insurance Company's Address _____

Type of Policy _____

Name of Agent _____ Agent's Telephone _____

Name of Insurance Company _____

Agency or Insurance Company's Address _____

Type of Policy _____

Name of Agent _____ Agent's Telephone _____

Name of Insurance Company _____

Agency or Insurance Company's Address _____

Type of Policy _____

Name of Agent _____ Agent's Telephone _____

Name of Insurance Company _____

Agency or Insurance Company's Address _____



Safe Deposit Box

Financial and Banking Information

Name of Bank and Branch _____
Safe Deposit Box Address _____
Name of Box Holder _____
Box Number _____
Location/Custodian of Key _____

Name of Bank and Branch _____
Safe Deposit Box Address _____
Name of Box Holder _____
Box Number _____
Location/Custodian of Key _____

Name of Bank and Branch _____
Safe Deposit Box Address _____
Name of Box Holder _____
Box Number _____
Location/Custodian of Key _____

Name of Bank and Branch _____
Safe Deposit Box Address _____
Name of Box Holder _____
Box Number _____
Location/Custodian of Key _____

Safe Deposit Box



Credit Card(s)

Financial and Banking Information

Account in Name of _____

Issuing Company _____ Telephone _____

Company Address _____

Account Number _____ Expiration Date _____

Account in Name of _____

Issuing Company _____ Telephone _____

Company Address _____

Account Number _____ Expiration Date _____

Account in Name of _____

Issuing Company _____ Telephone _____

Company Address _____

Account Number _____ Expiration Date _____

Account in Name of _____

Issuing Company _____ Telephone _____

Company Address _____

Account Number _____ Expiration Date _____

Account in Name of _____

Issuing Company _____ Telephone _____

Company Address _____

Account Number _____ Expiration Date _____

Account in Name of _____

Issuing Company _____ Telephone _____

Company Address _____

Account Number _____ Expiration Date _____

Credit Card(s)



Securities (Stocks, Mutual Funds, etc.)

Financial and Banking Information

Account in Name(s) of _____

Security	Broker	Certificate Number	Date	Bought No. Shares	Price	Net Total Cost	Date	Sold No. Shares	Price	Net Total Proceeds	Profit (Loss)

Account in Names(s) of _____

Security	Broker	Certificate Number	Date	Bought No. Shares	Price	Net Total Cost	Date	Sold No. Shares	Price	Net Total Proceeds	Profit (Loss)

Securities (Stocks, Mutual Funds, etc.)



Loans

Financial and Banking Information

Loans

Loan in Name of _____
Type of Loan _____ Loan Account Number _____
Original Amount of Loan _____ Due Date _____
Interest Rate _____ Term _____
Lender _____ Telephone _____
Address _____

Loan in Name of _____
Type of Loan _____ Loan Account Number _____
Original Amount of Loan _____ Due Date _____
Interest Rate _____ Term _____
Lender _____ Telephone _____
Address _____

Loan in Name of _____
Type of Loan _____ Loan Account Number _____
Original Amount of Loan _____ Due Date _____
Interest Rate _____ Term _____
Lender _____ Telephone _____
Address _____

Loan in Name of _____
Type of Loan _____ Loan Account Number _____
Original Amount of Loan _____ Due Date _____
Interest Rate _____ Term _____
Lender _____ Telephone _____
Address _____

Personal Property





Automobiles

Personal Property

Title in the Name of _____
Make/Model _____ Year _____
Vehicle ID Number _____ Color _____
Price _____ Date Purchased _____
Dealer _____ Telephone _____
Dealer's Address _____

Title in the Name of _____
Make/Model _____ Year _____
Vehicle ID Number _____ Color _____
Price _____ Date Purchased _____
Dealer _____ Telephone _____
Dealer's Address _____

Title in the Name of _____
Make/Model _____ Year _____
Vehicle ID Number _____ Color _____
Price _____ Date Purchased _____
Dealer _____ Telephone _____
Dealer's Address _____

Title in the Name of _____
Make/Model _____ Year _____
Vehicle ID Number _____ Color _____
Price _____ Date Purchased _____
Dealer _____ Telephone _____
Dealer's Address _____

Automobiles



Properties Owned

Personal Property

Description _____
Property in the Name of _____
Date Acquired _____ Purchase Price _____
Attorney _____ Telephone _____
Attorney's Address _____
Mortgager _____
Mortgager's Address _____
Mortgage Amount _____ Term _____
Date Sold _____ Sale Price _____

Description _____
Property in the Name of _____
Date Acquired _____ Purchase Price _____
Attorney _____ Telephone _____
Attorney's Address _____
Mortgager _____
Mortgager's Address _____
Mortgage Amount _____ Term _____
Date Sold _____ Sale Price _____

Description _____
Property in the Name of _____
Date Acquired _____ Purchase Price _____
Attorney _____ Telephone _____
Attorney's Address _____
Mortgager _____
Mortgager's Address _____
Mortgage Amount _____ Term _____
Date Sold _____ Sale Price _____

Properties Owned



Collections and Valuables

Personal Property

Item _____ Date Acquired _____
Purchase Price _____ Date Sold _____
Sales Price _____ Comments _____

Item _____ Date Acquired _____
Purchase Price _____ Date Sold _____
Sales Price _____ Comments _____

Item _____ Date Acquired _____
Purchase Price _____ Date Sold _____
Sales Price _____ Comments _____

Item _____ Date Acquired _____
Purchase Price _____ Date Sold _____
Sales Price _____ Comments _____

Item _____ Date Acquired _____
Purchase Price _____ Date Sold _____
Sales Price _____ Comments _____

Item _____ Date Acquired _____
Purchase Price _____ Date Sold _____
Sales Price _____ Comments _____

Item _____ Date Acquired _____
Purchase Price _____ Date Sold _____
Sales Price _____ Comments _____

Legal and Estate Information





Legal and Estate Information

Legal and Estate Information

Location of the Will _____
Location of Codicil _____
Date of Will _____ Date of Codicil _____
Will Prepared By _____
Witness to the Will _____
Name of Executor _____
Executor's Telephone _____
Executor's Address _____

Location of the Trust Agreement _____
Name and Date of Trust _____
Name of Trustee _____
Trustee's Telephone _____
Trustee's Address _____
Name of Beneficiary _____
Address of Beneficiary _____
Telephone of Beneficiary _____
Approx. Value of Trust _____

Name of Power of Attorney for Finances _____
POA's Telephone _____
POA's Address _____

Name of Power of Attorney for Health Care _____
POA's Telephone _____
POA's Address _____

Funeral Arrangements





Funeral Arrangements

Funeral Arrangements

Name of Funeral Home _____

Address of Funeral Home _____

Telephone Number of Funeral Home _____

Location of Pre-Payment Receipts or Deeds _____

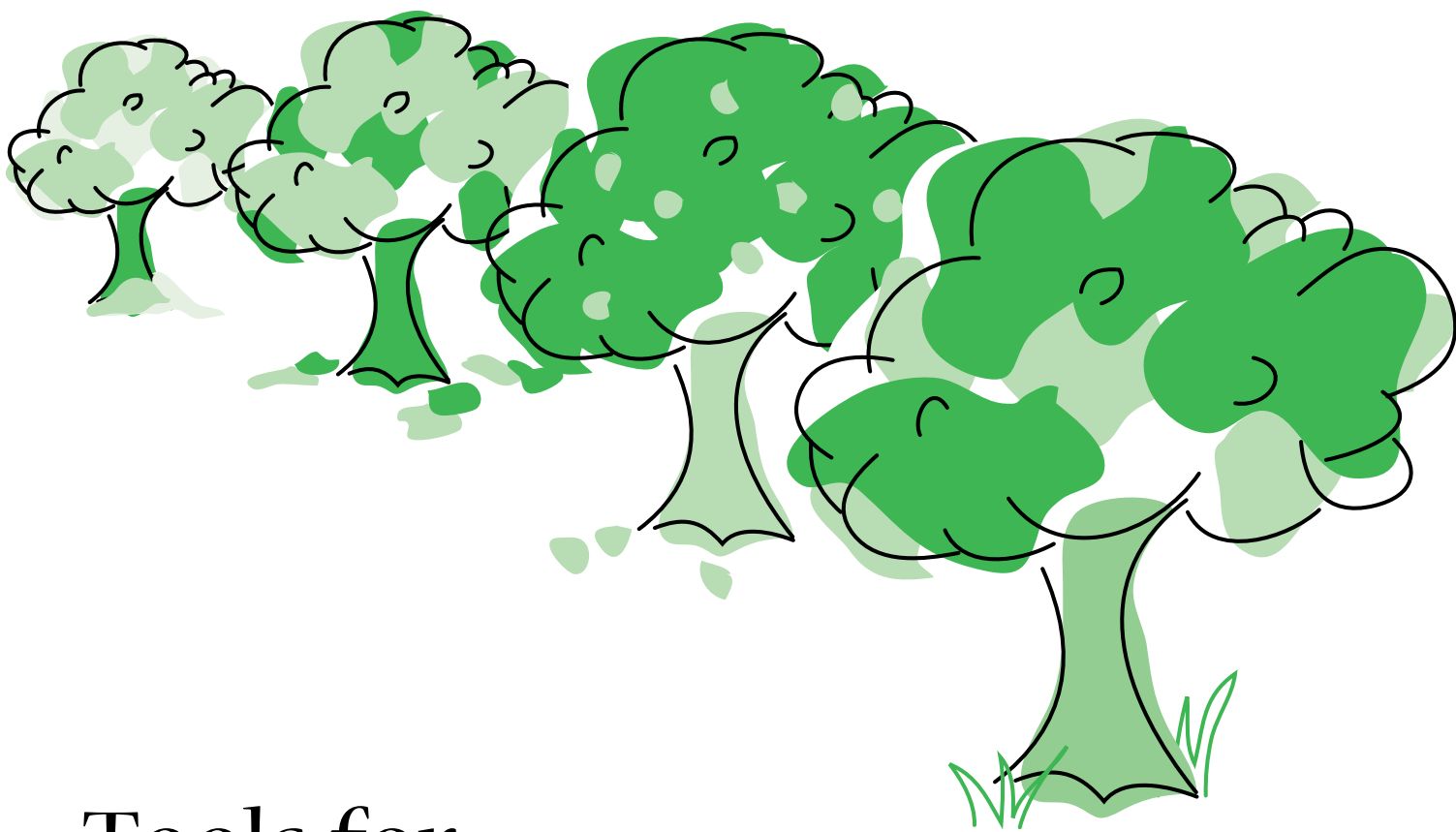
Name of Cemetery _____

Address of Cemetery _____

Telephone of Cemetery _____

Plot Number and Location _____

Special Instructions: _____



Tools for Caregivers



Document Locator

Tools for Caregivers

Document Locator

Personal Documents	Location
Birth Certificate	
Education Records	
Employment Records	
Military Records	
Religious Documents	
Medical Records	
Organ Donor Card	
Other	

Financial Documents	Location
Automobile Title/Registration	
Bank Statements	
CDs	
Checking/Savings Accounts	
Credit Cards	
Hospital Bills	
IRAs	
Mortgage Statements	
Mutual Funds	
Outstanding Loans	
Pension Records	
Savings Bonds	
Social Security Records	
Stock Certificates	
Tax Returns	
Utilities	
Other	

(continued)



Document Locator (continued)

Tools for Caregivers

Document Locator (continued)

Legal Documents	Location
Advance Directives	
Divorce Papers	
Marriage Licenses	
Passports/Naturalization Papers	
Property Deeds and Titles	
Trusts	
Wills and Codicils	
Other	

Insurance Documents	Location
Auto	
Disability	
Home	
Medicare	
Medicaid	
Medigap	
Life	
Long-Term Care	
Other	



Emergency Contact List

Tools for Caregivers

Use this form to record information that the family or caregivers may need in the event of an emergency. Please post in a visible place, such as the refrigerator, so that it is easy to find. Leave copies with all persons involved in caregiving.

Name of Elder _____

Address _____ Telephone _____

Health Insurance _____

Name of Primary Caregiver _____

Address _____

Telephone (h) _____ Telephone (o) _____

Cell Phone _____ Other _____

Other People to Contact (indicate name, relationship to elder, address, and telephone)

Physicians' Name(s) and Telephone(s)

Police _____ Fire Dept. _____

Poison Control Center _____ Pharmacy _____

Local Hospital _____

(continued)



Emergency Contact List (continued)

Tools for Caregivers

Other Important Numbers

Special Instructions (Note any special needs or concerns)

Medications

Allergies

Emergency Contact List (continued)



Daily Schedule and Events

Tools for Caregivers

Use this form to communicate with a caregiver and to keep a record of elder's daily schedule. Please feel free to make multiple copies of this form.

Date _____ Caregiver _____

Notes from Family to Caregiver

Appointments (type, time, and location)

Household Chores

Notes from Caregiver to Family

Meals (what elder ate today)

Breakfast _____

Lunch _____

Dinner _____

Snacks _____

Activities (what activities did the elder do today?)

(continued)



Daily Medication Log

Tools for Caregivers

Use this form to track all medications (prescription and non-prescription) given. Please feel free to make multiple copies of this form.

Date _____

Morning: _____

Name of Drug _____ Time Given _____ Given by _____

Name of Drug _____ Time Given _____ Given by _____

Name of Drug _____ Time Given _____ Given by _____

Name of Drug _____ Time Given _____ Given by _____

Name of Drug _____ Time Given _____ Given by _____

Name of Drug _____ Time Given _____ Given by _____

Name of Drug _____ Time Given _____ Given by _____

Afternoon: _____

Name of Drug _____ Time Given _____ Given by _____

Name of Drug _____ Time Given _____ Given by _____

Name of Drug _____ Time Given _____ Given by _____

Name of Drug _____ Time Given _____ Given by _____

Name of Drug _____ Time Given _____ Given by _____

Name of Drug _____ Time Given _____ Given by _____

Name of Drug _____ Time Given _____ Given by _____

Evening: _____

Name of Drug _____ Time Given _____ Given by _____

Name of Drug _____ Time Given _____ Given by _____

Name of Drug _____ Time Given _____ Given by _____

Name of Drug _____ Time Given _____ Given by _____

Name of Drug _____ Time Given _____ Given by _____

Name of Drug _____ Time Given _____ Given by _____

Name of Drug _____ Time Given _____ Given by _____



Health Care Provider Communications Log

Tools for Caregivers

Date of Office Visit _____

Doctor's Name _____

Reason for Visit (check up, follow-up, new doctor) _____

Symptoms or Concerns

(Has anything changed since last visit? Have you consulted with other health care providers?)

1. _____
2. _____
3. _____
4. _____
5. _____

Questions for Health Care Provider:

1. _____
2. _____
3. _____
4. _____
5. _____

Notes

(diagnosis, course of treatment, referrals, special instructions, and date of next scheduled visit)



Important Dates to Remember

Tools for Caregivers

Important Dates to Remember

Birthdays

Anniversaries

Other



Valuable Websites

Tools for Caregivers

www.alz.org

The Alzheimer's Association gives tips and resources for caregivers and persons with Alzheimer's, answers to frequently asked questions, referrals to support groups, information on the latest research, and referrals to local chapters.

www.aoa.dhhs.gov

The Administration on Aging has one of the most comprehensive databases on aging. Some of the topics covered are: adult day care; assisted living; caregiving resources; diversity and aging; elder law; health and long-term care costs; low vision; mental health; prescription drugs; reverse mortgages; and much more. This site also provides links to aging-related websites and a directory of government sponsored aging services in each state.

www.aarp.org

AARP's site has a wealth of information on a variety of aging related topics. Learn more about important legislative issues; research on health and wellness, long term care insurance, retirement planning, Medicare and links to other web sites.

www.caremanager.org

The National Association of Professional Geriatric Care Managers is a membership organization that provides educational and resource information to both caregivers and professionals. This site contains an online directory of Professional Geriatric Care Managers listed by state.

www.elderweb.com

ElderWeb is the oldest and largest sourcebook on the Web. It is a research site for professionals and family members, with a collection of over 5,000 on-site and off-site articles about eldercare and long-term care, including legal, financial, medical, and housing issues.



Valuable Websites

www.medicare.gov

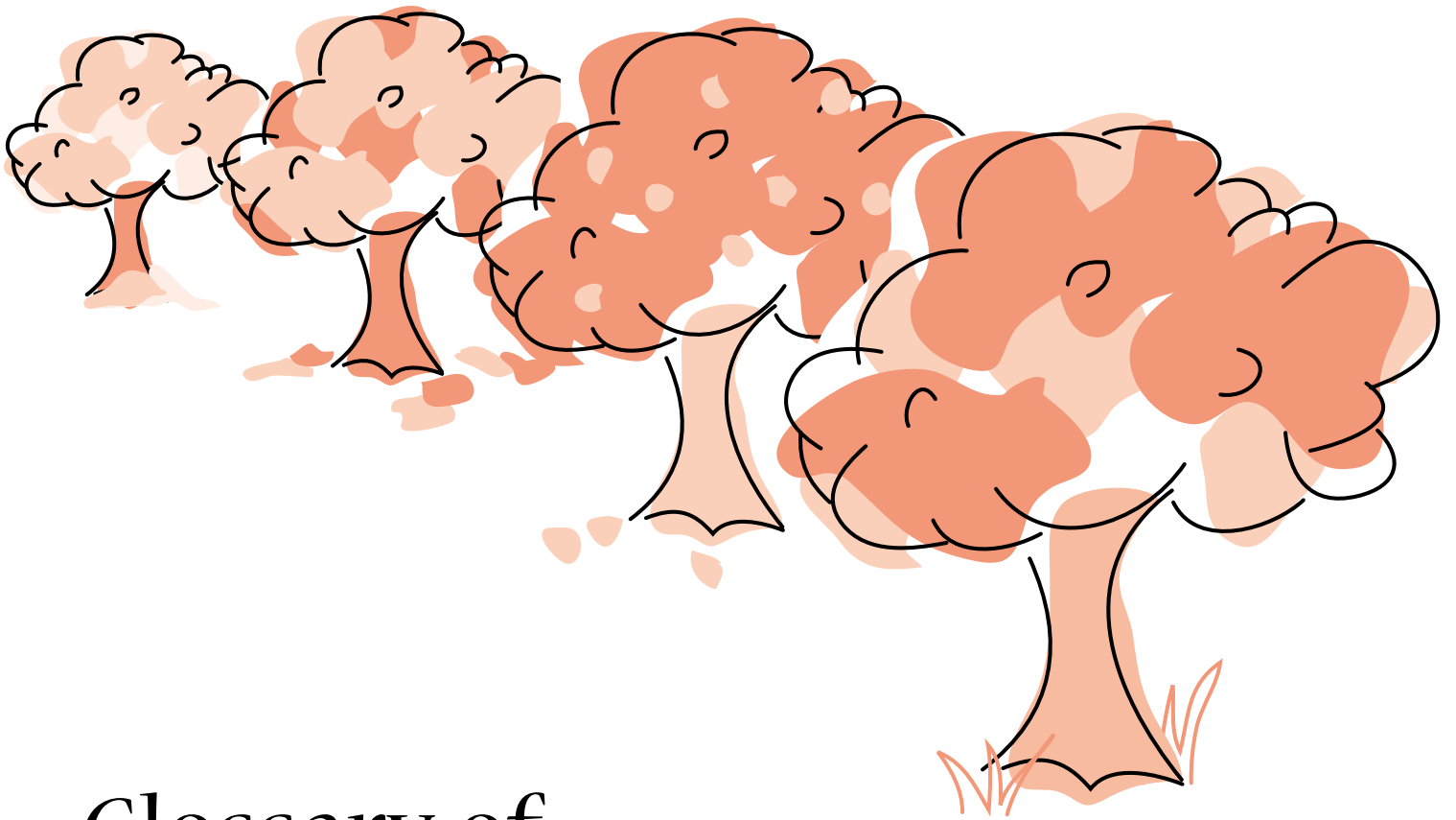
Medicare's official website has an interactive database that includes detailed information on Medicare's health plan options. There is a feature that allows you to "comparison shop" which is a very useful tool in determining the plan that will work best for you. This site also has information about every Medicare and Medicaid certified nursing home in the country.

www.naela.com

The National Academy of Elder Law Attorneys has information to assist lawyers and other professionals who are involved with legal services to older adults and those with disabilities. This site contains an online referral directory of attorneys across the United States who specialize in elder law.

www.pueblo.gsa.gov

This Federal Consumer Information Center site will take you to hundreds of consumer publications that you can read or order online. An excellent resource to learn more about Social Security and Medicare.



Glossary of Eldercare Terms



Glossary of Eldercare Terms

Glossary

Activities of Daily Living (ADL's)

ADL's are usually considered to be basic functions performed by the individual to maintain self-care and social functioning, such as walking, dressing, grooming, getting in and out of bed, eating, bathing, and using the bathroom.

Adult Day Care Center

A community based program that may feature supervised activities, meals, health, and rehabilitative services for older adults who, because of mental or physical limitations, are unable to participate in typical senior center programs. Most adult day care centers operate during the week and can be attended full or part-time.

Advance Directive

A written and properly witnessed statement of an individual's preferences regarding the manner in which they would like to receive health care, in the event that they become unable to express their wishes directly. Living Wills and Health Care Powers of Attorney are examples of Advance Directives.

Alzheimer's Disease

A progressive, degenerative disease, typically occurring in older adults, that attacks the brain and results in impaired memory, thinking, and behavior.

Ambulatory Care

Health services that do not require an overnight hospital stay.

Aphasia

The loss of the faculty of using or understanding language. (*The Random House Dictionary*, 1980)

Area Agency on Aging

The agency (typically at the county or city level) that administers government funded programs for older adults, such as adult day health care, transportation, home delivered meals, and referrals to home care agencies and long-term care facilities.

Assisted Living

Assisted living is a general term for a residential facility with staff who provide round-the-clock assistance such as help with dressing, bathing, feeding, and housekeeping. Assisted Living Facilities usually offer minimal to no skilled nursing care. Medicare typically does not cover care in Assisted Living Facilities.

Caregiver

An individual who takes care of an older person who needs assistance with Activities of Daily Living (ADL's). A caregiver may be paid for these services, or may be a family member or friend.

Chore/Companion Services

Services in the home that may include housekeeping, meal preparation, shopping, and transportation. These services are not considered to be skilled medical care and tend not to be covered by Medicare.

Cognition

The process of recognizing, understanding, remembering, and evaluating relevant information.

**Conservator**

An individual or individuals appointed by the court to act as the legal representative of a person who is mentally or physically incapable of managing his or her own affairs. A conservator may be an individual or a public or private agency.

Continuing Care Retirement Communities (CCRCs)

Housing communities that offer different levels of care ranging from independent living to skilled nursing care. Many CCRC's require a large down payment prior to admission, in addition to monthly fees.

Dementia

Deterioration of cognitive ability, characterized by disorientation and loss of memory.

Discharge Planner

A social worker or nurse, who assists patients and their families with health care arrangements following a hospital stay.

Durable Power of Attorney

A power of attorney that stays in effect even after the individual who signs it becomes incompetent to handle his or her own affairs.

Elderlaw Attorney

Attorneys who specialize in issues concerning older adults such as: estate planning, wills, guardianship and conservatorship, financial and health care powers of attorney, and Medicare and Medicaid.

Emergency Response Systems

An electronic system that automatically links an individual to assistance in the event of an emergency.

Geriatric Care Manager

A professional (usually a licensed social worker or nurse) who performs an individual assessment of an older person's capabilities and needs and creates a care plan to address housing, medical, social, and other needs.

Geriatrician

Physicians who have specialized training in the care and well being of older adults.

Guardian

An individual (who may or may not be family) appointed by the court to make health care decisions for an older adult who has been determined by the court to be no longer capable of making decisions for him/herself.

Health Care Power of Attorney

A written and properly witnessed statement in which an individual appoints another individual to make health care decisions on their behalf.

Home Health Care/Agency

Provides skilled and non-skilled services in the home, which may include: nursing, occupational, speech or physical therapy, social work, or a home health aide. Medicare usually covers this care during an acute period of illness.

**Home Health Aide**

An individual who provides personal care, such as bathing, dressing, grooming, assistance with meals, and some light housekeeping.

Hospice Care

Care that addresses the needs (physical, spiritual, emotional, psychological, social, financial, and legal) of a dying person and his or her family. Under certain circumstances, Medicare will pay for hospice either in the home or in a specified facility such as a nursing home.

Incompetence

Determined by a legal proceeding: Requires that an individual is incapable of handling assets and exercising certain legal rights.

Living Will (See Advance Directive)**Long-Term Care Facilities**

Range of institutions that provide custodial and/or nursing care to people who are unable to manage independently in the community. Facilities may provide short-term rehabilitative services as well as chronic care management.

Long-Term Care Insurance

Private insurance designed to cover long-term care costs.

Long-Term Care Ombudsman

The long-term care Ombudsman is a patient advocate who investigates consumer complaints against a nursing home or community resident facility. Typically, the Ombudsman is not allowed to recommend one nursing home over another. However, he/she can provide information on the nature and number of complaints about a given facility. The ombudsman is usually associated with the local area agency on aging.

Medicare

The federal health insurance program for people 65 years of age or older, certain younger people with disabilities, and people with End-Stage Renal Disease. Part A covers in-patient care. Part B covers doctors' services. Medicare generally does not cover long-term care.

Medicare Supplemental Insurance

Private insurance (often called Medigap) that pays Medicare's deductibles and co-insurance, and may cover some charges not covered by Medicare.

Medicaid

A joint Federal and State program that assists with medical costs for certain individuals with low incomes and limited resources. Medicaid programs and eligibility requirements vary from State to State.

Original Medicare Plan

The traditional pay-per-visit health plan that lets the insured go to any doctor, hospital, or other health care provider who accepts Medicare. Unlike most Medicare HMO's, the insured pays a deductible and coinsurance.

**Palliative Care**

Pain management, often referred to in care for the terminally ill. (Also see Hospice Care.)

Qualified Medicare Beneficiary (QMB)

Persons who have Medicare Part A, low monthly incomes, and limited resources. It pays for an individual's Medicare Part A premium (if eligible), Part B premiums, and Medicare deductibles and coinsurance amounts for Medicare services provided by Medicare providers. Check your state, county, or local medical assistance office to see if you qualify.

Respite

Services designed to provide temporary relief for caregivers. Respite services can be provided in the home, community setting, or long-term care facility. Care may be from a few hours to several weeks. An adult day care center is an example of respite.

Retirement Community

A type of living arrangement for older adults who are nearly or totally independent. These communities tend to provide laundry services, housekeeping, meals, recreational, and social programs. Nursing services are not typically offered, but may be hired privately.

Reverse Mortgage

A financial tool which provides seniors with funds from the equity in their homes. Generally, no payments are made on a reverse mortgage until the borrower moves or the property is sold. The final repayment obligation is designed to not exceed the proceeds from the sale of the home.

Skilled Care

Health care services furnished by licensed medical professionals such as nurses and therapists.

Skilled Nursing Facility

Residential facilities, also known as Nursing Homes and Long-Term Care Facilities, that provide 24 hour skilled nursing assistance and rehabilitative care. Generally, individuals who are bedridden, cannot feed themselves, or who require skilled care, are appropriate for this level of care.

Specified Low-Income Medicare Beneficiaries (SLMB)

Persons entitled to Medicare Part A, who have low monthly incomes, and limited resources. If you qualify, Medicare pays the premium for Part B. Check your state, county, or local medical assistance office to see if you qualify under this year's income limits.

Supplemental Security Income (SSI)

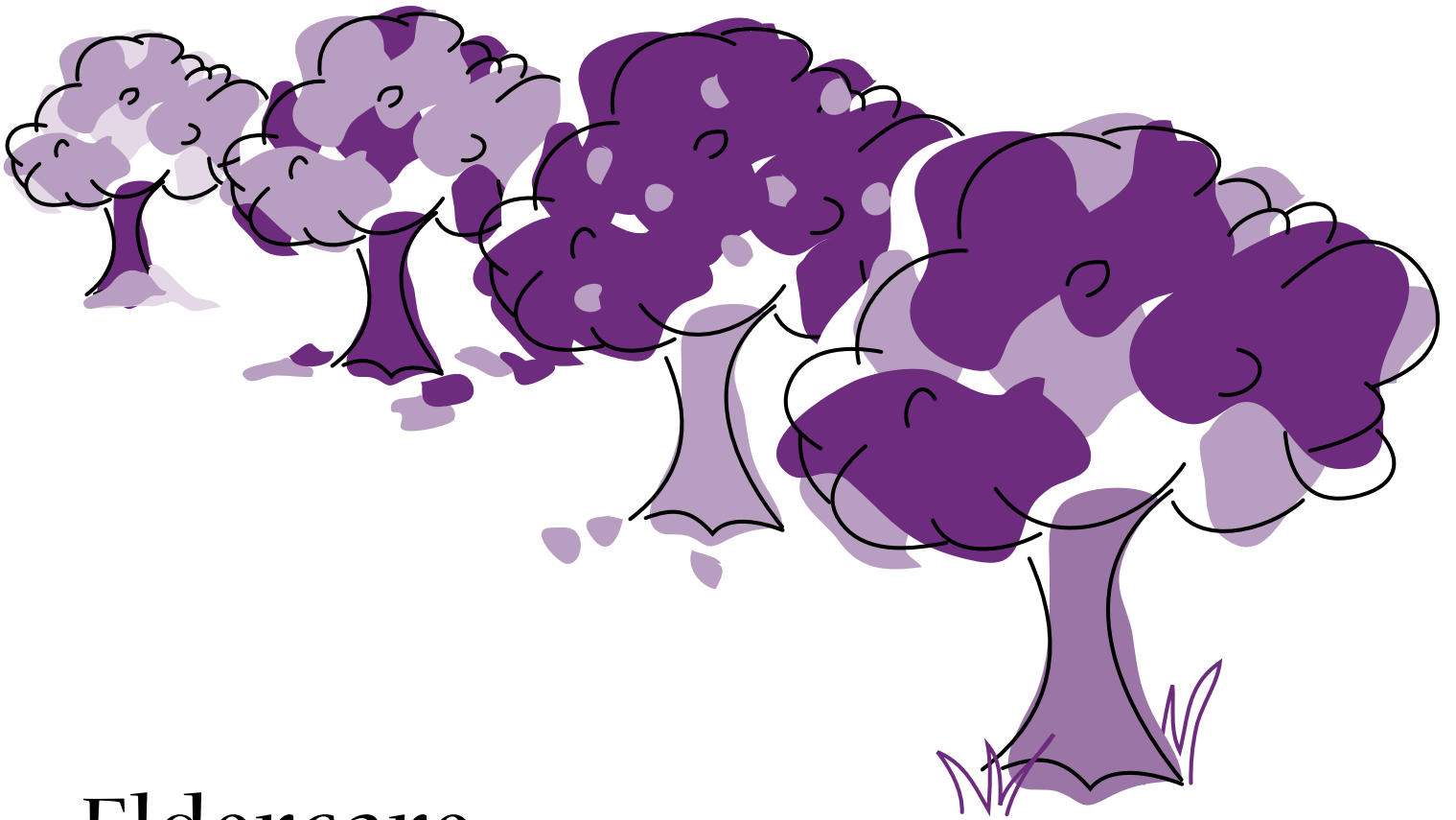
A government-funded program for people who are 65 or older, blind, or disabled, and who have income below certain limits. This program enables individuals with low incomes to receive Social Security benefits (and perhaps food stamps and Medicaid).

Trustee

An individual who is named to manage the property of an established trust for the benefit or use of the beneficiary(ies).

Will

A legal document that specifies how one's belongings, assets, and property will be divided upon his or her death.



Eldercare Bibliography



Eldercare Bibliography

Books on Eldercare and Caregiving

- Adams, Tom, and Armstrong, Kathryn. *When Parents Age: What Children Can Do*. Berkeley Publishing Group, 1993
- Astor, Brent. *Baby Boomer's Guide to Caring for Aging Parents*. Macmillan/Spectrum, 1998
- Beresford, Larry. *The Hospice Handbook*. Little Brown and Co., 1993
- Berman, Claire. *Caring for Yourself While Caring for Your Aging Parents*. Henry Holt and Company Inc., 1996
- Burger, Sara Greene. *Nursing Homes: Getting Good Care There*. Impact Publishers, 1996
- Carter, Rosalynn. *Helping Yourself Help Others: A Book for Caregivers*. Random House, 1994
- Cassidy, Thomas M. *Elder Care: What to Look for, What to Look Out for!* New Horizon Press, 1997
- Cohen, Donna and Eisdorfer, Carl. *Caring for Your Aging Parents: A Planning and Action Guide*. Tarcher/Putman, 1995
- Heath, Angela. *Long Distance Caregiving*, American Source Books, 1991
- Karr, Katherine L. *Taking Time for Me. How Caregivers Effectively Deal with Stress*. Prometheus Books, 1992
- LeBoeuf, Gene. *LeBoeuf's Home Healthcare Handbook*, Noel Press, Inc., 1996
- Lebow, Grace and Kane, Barbara. *Coping with Your Difficult Older Parent: A Guide for Stressed-Out Children*. Avon Books, New York, 1999
- Levin, Nora Jean. *How to Care for Your Aging Parents: A Practical Guide to Eldercare*. W.W. Norton, New York, 1997
- Loverde, Joy. *The Complete Elder Care Planner: Where to Start, Questions to Ask and How to Find Help*. Hyperion, 1997
- Lustbader, Wendy, and Hooyman, Nancy R. *Taking Care of Aging Family Members: A Practical Guide*. Simon & Schuster, 1994
- McFarlane, Rodger, and Bashe, Philip. *The Complete Bedside Companion*. Simon and Schuster, 1998
- Meshinsky, Joanne. *How to Choose a Nursing Home: A Guide to Quality Caring*. Avon Books, New York, 1991
- Meyer, Maria and Derr, Paula. *The Comfort of Home: An Illustrated Step-by-Step Guide for Caregivers*. CareTrust Publications, 1998
- Morris, Virginia. *How to Care for Your Aging Parents*. Workman Publishing Co., New York, 1996
- Pollin, Irene, with Golant, Susan K. *Taking Charge: Overcoming the Challenges of Long-Term Illnesses*. Times Books, 1994



Rob, Caroline. *The Caregivers Guide: Helping Elderly Relatives Cope with Health and Safety Problems*. Houghton Mifflin, Boston, 1991

Susik, D, Helen. *Hiring Home Caregivers: The Family Guide to In-Home Eldercare*. Impact Publishers/American Source Books, 1995

Visiting Nurse Associations of America. *Caregiver's Handbook: A Complete Guide to Home Health Care*. DK Publishing, 1998

Williams, Gene B. and Kay, Patie. *The Caregiver's Manual*. Citadel Press, 1995

Books on Caregiving for Someone with a Specific Illness

Mace, Nancy and Rabins, Peter. *The 36-Hour Day: A Family Guide to Caring for Persons with Alzheimer's Disease, Related Dementing Illness, and Memory Loss in Later Life*. The Johns Hopkins University Press, Baltimore, 1991

Powell, Lenore S. *Alzheimer's Disease: A Guide for Families*. Addison-Wesley Publishing Company, 1993

Shirk, Evelyn. *After the Stroke: Coping with America's Third Leading Cause of Death*. Prometheus Books, 1991

Strong, Maggie. *Mainstay: For the Well Spouse of the Chronically Ill*. Bradford Books, 1997

Warner, Mark. *The Complete Guide to Alzheimer's Proofing Your Home*. Purdue University Press, 1998

Books on Aging

Butler, Robert N. *Why Survive? Being Old in America*. Harper and Row, New York, 1975

Chopra, Deepak. *Ageless Body Timeless Mind: The Quantum Alternative to Growing Old*. Harmony Books, New York, 1993

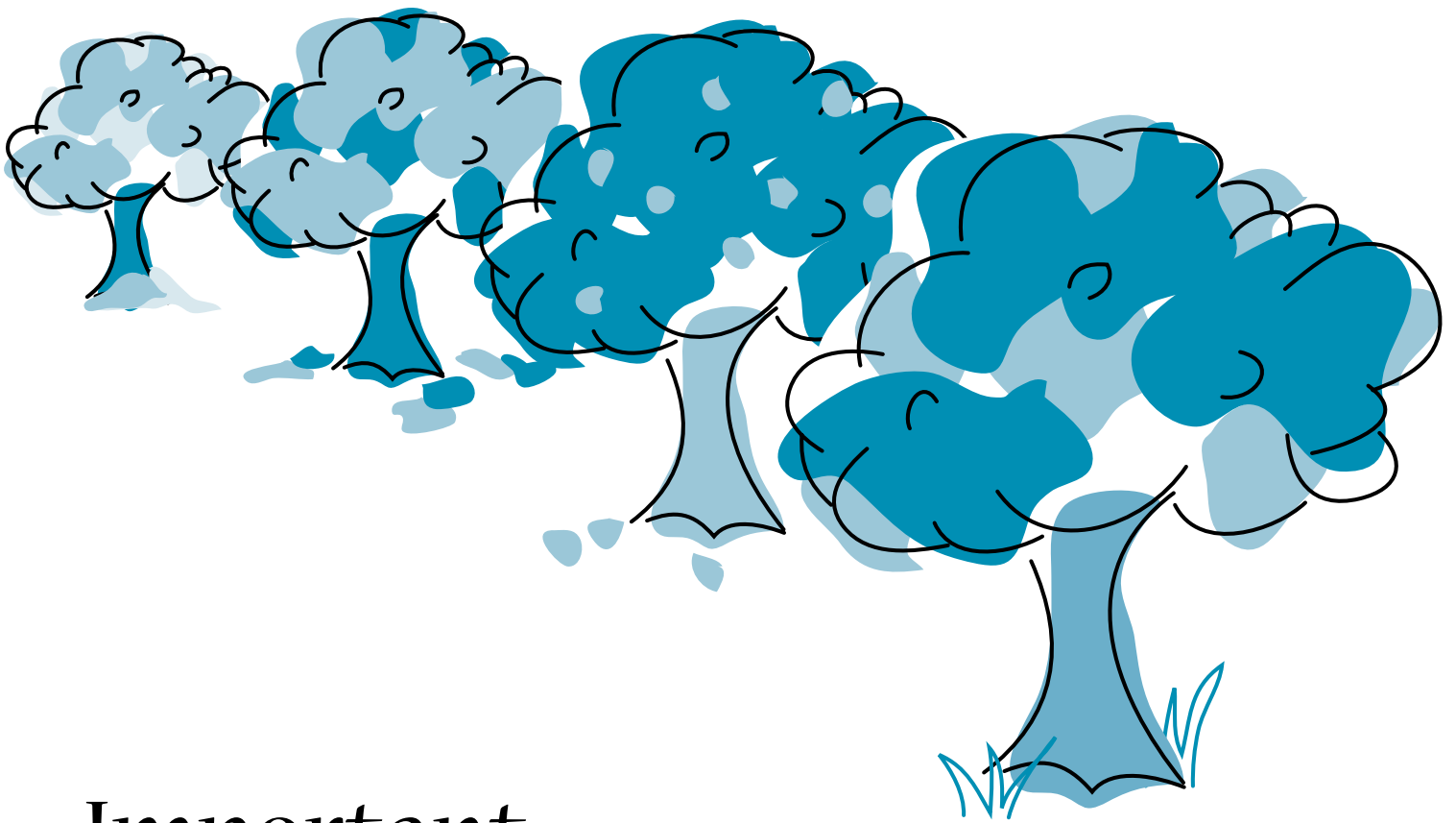
Friedan, Betty. *The Fountain of Age*. Simon & Schuster, New York, 1993

Pipher, Mary. *Another Country: Navigating the Emotional Terrain of Our Elders*. Riverhead Books, New York, 1999

Silverstone, Barbara and Hyman and Helen Kandel. *Growing Old Together*. Pantheon, New York, 1992

Tobin, Sheldon S. *Personhood in Advanced Old Age*. Springer Publishing Co.. New York, 1991

Vorst, Judith. *Necessary Losses*. Random House, New York, 1996



Important Documents



Important Documents

Important Documents

- Recent Photograph of Elder
- Copy of Elder's Health Insurance Cards
- Copy of Elder's Health Care Proxy/Living Will



Recent Photograph

Place a recent photograph here



Health Insurance Cards

Place a **copy** of health insurance card

(Front of card)

Place a **copy** of health insurance card

(Back of card)



Health Care Proxy/Living Will

Health Care Proxy/Living Will

Place a copy of elder's health care proxy/living will



3900 Wisconsin Avenue, NW
Washington, DC 20016-2892

D6015E09/00 © 2000 Fannie Mae

 **FannieMae**
www.fanniemae.com