

Visit Companion Checklist

We would like to know what you need to care for yourself and your care recipient. Please place a check mark (✓) next to the item(s) that best represent your main concerns and priorities at this time.

At this time, I would like to know more about:	✓
My care recipient's health conditions and treatment plans <i>Examples: Information about dementia, diabetes, or heart disease; next steps in care</i>	☐
My care recipient's medications <i>Examples: Why a new pill was prescribed, side effects, how to keep track of medicines</i>	☐
How to perform health management tasks or provide personal care <i>Examples: Checking blood sugar, helping with dressing or toileting, preparing meals</i>	☐
Finding ways to cope with my feelings, stress, or worries <i>Examples: Find someone who can give advice about stress, get a break (respite)</i>	☐
How to get help paying for medical bills, drugs, or supplies <i>Examples: Benefits or insurance (e.g. Medicaid), copays, managing finances</i>	☐
Making medical appointments and speaking with health care providers <i>Examples: Bilingual services or specialist referrals; how to reach providers</i>	☐
Arranging needed services for my care recipient <i>Examples: How to find a home health aide, home delivered meals, or transportation</i>	☐
Something else (please briefly describe):	☐

Of the items you checked, which is **most important** to you **right now**?

Please use the space below to elaborate on your response(s).

Can we contact you in the future?

☐ **YES** ☐ **NO**

Provider Tip Sheet

There may be limited time during the visit to address visit companions' needs and concerns. The Visit Companion Checklist is intended to help companions determine which of their needs are most important to address. It is not necessary (or appropriate) to review all Checklist items at every visit, only the ones that the companion identifies as most important.

The Provider Tip Sheet is intended to facilitate tailored action – discussion that leads to education, training, or referral – to address the main concerns identified by the Visit Companion Checklist. Below is a sample of how each need or concern identified by the Checklist may be addressed.

Checklist Item	Possible Action
Health conditions or treatment plans	Provide patient education materials, if available. Direct care partner to general consumer health websites (e.g. mayoclinic.org) or disease-specific websites (e.g. https://www.alz.org/alzheimers-dementia/what-is-alzheimers; nia.nih.gov/health/alzheimers).
Understanding medications	Respond to questions about a new prescription, drug side-effects, or how to keep track of medications. Refer to pharmacy for follow-up.
How to perform health management tasks or personal care	Provide contact details for a practice nurse who can provide task-specific training (in person, by phone). Medicare evaluation and management or chronic care management codes may be used to bill. If appropriate, direct care partner to patient's PT, OT, or home health aide to receive instruction on specific tasks (i.e., if patient has a homecare referral, a visiting nurse may assist with in-home training). If none of the above are available, provide link to AARP "how to" series: https://www.aarp.org/ppi/initiatives/home-alone-alliance.html
Finding ways to cope with stress/worries	Encourage companion to see own primary care physician or social worker or offer telephone numbers to support groups or Area Agencies on Aging, or links to online resources, such as: <i>Local Alzheimer's Association Chapter</i> (1-800-272-3900; https://www.alz.org/local_resources/find_your_local_chapter) <i>ALZConnected</i> (alzconnected.org) <i>National Family Caregivers Association</i> (1-800-896-3650; www.nfcacares.org) <i>National Alliance for Caregiving</i> (1-301-718-8444; www.caregiving.org) <i>National Association for Area Agencies on Aging (N4A)</i> (202-872-0888; https://www.n4a.org/) <i>AARP Public Policy Institute</i> https://www.aarp.org/caregiving/life-balance/info-2017/respite-care-plan.html?intcmp=AE-CAR-LEG-IL For respite, provide link to: https://aging.ny.gov/respite
Paying for services/finances	Direct care partner to a social worker or an elder care lawyer (neala.org) to assist with Medicaid applications.

	Provide link to Alzheimer's Association information for financial planning: alz.org/care/alzheimers-dementia-common-costs.asp Provide Medicaid Hotline (1-800-638-6833) or link to: https://www.medicaid.gov/about-us/contact-us/contact-your-state-questions/index.html Provide Medicare hotline (1-800-333-4114) and links to: https://medicareguide.com/medicare-coverage https://www.medicarerights.org/
Making medical appointments or speaking with providers	Provide relevant contact information (e.g. practice phone number, link to patient portal, physicians' direct line, on-call number). Explain which method should be used for specific situations (e.g. during vs. after hours; urgent vs. non-urgent requests; direct vs. indirect contact with physician). Discuss legal rights to coordinate care, speak with providers, manage patient's health, and make decisions (power of attorney): https://www.aarp.org/caregiving/financial-legal/info-2019/types-of-power-of-attorney.html Offer telephone number/contact details for bilingual/translator services. Discuss care coordination and provide link to: nextstepincare.org/uploads/File/Guides/Care_Coordination_Care_coordination.pdf
Arranging services	<u>Home health care:</u> For general guidance, provide AARP links: https://www.aarp.org/caregiving/home-care/info-2018/hiring-caregiver.html https://www.aarp.org/caregiving/home-care/info-2019/home-health-aides.html?intcmp=AE-CAR-LEG-IL If outpatient and qualifies through Medicaid, complete M11Q (Medicaid licensed home care agency) form. If outpatient and does not qualify through Medicaid (or wants private hire/private agency), direct to ElderCare Locator (1-800-677-1116): https://eldercare.acl.gov/Public/Index.aspx If inpatient, after discharge, visiting nurse will conduct assessment in the home and decide whether a home health aide is required. <u>Home delivered meals:</u> Provide phone number (212-AGING-NYC) and link to NYC Department for the Aging (DFTA) Aging Connect: https://www1.nyc.gov/site/dfta/services/find-help.page Link to Citymeals: https://www.citymeals.org/get-meals/resources <u>Transportation:</u> Provide link to: https://new.mta.info/accessibility/paratransit Offer telephone number (212-956-0855) for Community Arranged Resident Transportation Program (Project CART) or link to: https://www.nyfsc.org/wp-content/uploads/2018/04/PROJECT-CART-FLYER.pdf