

Care Planning Considerations

(1) Information About the Protected Person

Name _____

Date of Birth _____

Social Security Number _____

Address _____

Phone Number _____

Email Address _____

(2) Information About You

I am the protected person's guardian conservator.

I was appointed by the district court in _____ (name of city).

Case Number: _____

(3) Choosing a Place for the Protected Person to Live

(a) Protected person's preference

- Where does the protected person want to live?
- Would s/he be safe living there?
- Is the level of care appropriate for the protected person's abilities and limitations?
- Is the quality of care acceptable?
- What accommodations would make it safe, appropriate and acceptable?
- Can s/he afford the residence and the accommodations?
- Is the residence accessible to those who want to visit and who s/he wants to see?
- Did the protected person select the residence because there are other residents who are friends or who share his or her spiritual or cultural values and preferences?
- If s/he lives there, how soon might s/he have to move to accommodate abilities and limitations?
- Do you have any issues or concerns about the protected person's preference? Does it result in any unmet needs?

(b) Your preference

- Where do you think s/he should live? Why?
- Would s/he be safe living there?
- Is the level of care appropriate for the protected person's abilities and limitations?
- Is the quality of care acceptable?
- What accommodations would make it safe, appropriate and acceptable?
- Can s/he afford the residence and the accommodations?
- Is the residence accessible to those who want to visit and who s/he wants to see?
- Did the protected person select the residence to be surrounded by those who share his or her spiritual or cultural values and preferences?
- If s/he lives there, how soon might s/he have to move to accommodate abilities and limitations?
- Has anyone else made a recommendation?
- What have you decided?
- Does the protected person understand and accept that decision?

(c) Other considerations

- If the protected person moves to a different residence, who will you notify?
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(4) Healthcare Decisions for the Protected Person

- Does the protected person have an injury, physical disability, physical illness or mental illness?
- Have these been diagnosed?
- What are the treatment options and their consequences?
- What does the physician recommend?

(a) Protected person's preference

- What treatment does the protected person want?
- Does s/he understand the options and their consequences?
- Is the protected person's preference in keeping with long held beliefs, cultural values or decisions s/he made when not incapacitated?
- Can s/he afford the preferred treatment?

- Do you have any concerns about the protected person's preference?

(b) Your preference

- What treatment do you want? Why?
- Do you understand the options and their consequences?
- Has anyone else made a recommendation?
- What have you decided?
- Does the protected person understand and accept that decision?

(c) Other considerations

- What do you know about the protected person's end-of-life preferences? Do you share these beliefs? Can you honor them even if you do not share them?
- If you genuinely believe that in a given circumstance the protected person would make a decision that would cause or hasten death, can you make that decision for the protected person?
- Are any physical or mental examinations necessary to determine the protected person's healthcare needs?
- How often should the protected person consult with the protected person's physician, dentist, optometrist, psychiatrist, psychologist?
- Does the protected person have any allergies to medication?
- What medicine is the protected person taking and what is the dosage?
- Are all healthcare providers familiar with the medications that the protected person is taking?
- Has a healthcare provider recommended a special diet for the protected person? Is s/he eating those foods?
- Has a healthcare provider recommended a physical, speech or vocational therapy for the protected person? Is conducting those therapies?
- Do you have any issues or concerns about healthcare? Does the protected person have any unmet needs?
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(5) Personal Needs of the Protected Person

Can the protected person do these things? Or does s/he need help? Does s/he want to do them?

- Can the protected person drive a car? Take public transportation? Can you provide transportation? Are there community services, family members or friends who can help?
- Once at the store, does the protected person know what food and home supplies s/he needs? Can s/he find those things? Can s/he pay for them at the checkout?
- Can the protected person prepare food at home?
- Does the protected person know which prescribed and over-the-counter medicine to buy? Can s/he dispense the medicine on time and in proper amounts?
- Can the protected person launder his or her clothes? Get dressed and undressed?
- Can the protected person brush teeth, clip nails, wash hair, hands and body, comb hair?
- Does the protected person have the durable medical equipment that s/he needs, like a cane, walker or wheelchair? Does s/he have the glasses, dentures and hearing aids that s/he needs? Can s/he replace a hearing aid battery?
- Can the protected person get in and out of the shower or tub safely? Can s/he get on and off the toilet? Does s/he know when s/he needs to use the toilet?
- Can the protected person take care of housekeeping, yard care and other chores?
- Can the protected person use the telephone? A computer?
- Can the protected person handle an emergency at home? Call 911? Leave the home independently if needed?
- Does the protected person know which bills to pay? How much? When? s/he pay them? Can s/he manage his or her money and resist fraud?
- Do you have any issues or concerns about the protected person's personal needs? Does the protected person have any unmet needs?

(6) Banking for the Protected Person

- Does the protected person have a savings or checking account? Do the accounts have the right services for what the protected person needs? Are the fees reasonable?
- Is the protected person the sole owner of the accounts? Does the bank recognize your authority to make transactions?
- Is any of the protected person's money and your money in the same account?
- Are you using direct deposit? Automatic bill pay? Online banking?

- Are you paying for purchases and bills by check, credit card or debit card?
- Are you keeping a record of all income and payments?

(7) Record Keeping for Guardians and Conservators

- Are you keeping a journal or diary of the protected person's income and payments?
- Are you keeping a journal or diary of the protected person's circumstances and the events in his or her life?

(8) Identifying the Protected Person's Property

- What income does the protected person qualify for? What services does s/he qualify for? What benefits does s/he qualify for?
- What financial property (savings and checking accounts, IRAs, 401(k)s, CDs, life insurance, annuities, stocks and bonds, trusts, etc.) does s/he own?
- What personal property (vehicles, furniture, appliances, tools, art, jewelry, electronics, etc) does s/he own?
- What real property (home, vacation home, other land) does s/he own?
- Is the protected person the sole owner of his or her property? Or is someone else a co-owner?
- What debts (mortgage, car loan, credit cards, etc.) does the protected person have? Is the protected person the solely responsible for these debts? Or someone else also responsible?

(9) Budgeting for the Protected Person

- What income does the protected person qualify for? What services does s/he qualify for? What benefits does s/he qualify for?
- What regular expenses does s/he have? Can any of those expenses be eliminated or reduced without harm?
- What additional expenses do you expect in the future? Will the protected person have enough money to pay for them?
- Is the protected person able to save money on a regular basis? (Are his or her expenses less than income?)

(10) Keeping the Protected Person's Property Safe

- Have you mixed any of the protected person's money or property with your own? With anyone else's?

- Have you used any of the protected person's money for your expenses? For anyone else's?
- Have you used the protected person's property for your benefit? For anyone else's?
- Does the protected person have property that needs to be insured? Sold? Secured? Stored?
- Does the protected person have the right insurance?
- Does s/he have a safe deposit box? Does s/he need one?

(11) Managing the Protected Person's Property

- Is anyone legally dependent on the protected person for support, like a spouse or minor child?
- Do you know which bills to pay, when and how much?
- Does the protected person have to file income tax returns?
- Does the protected person have to pay property taxes?
- Is the protected person able to save money on a regular basis? (Are his or her expenses less than income?)
- Does the protected person have enough money to invest? Does s/he have a trustworthy financial planner? What does the financial planner advise? What does the protected person think of that advice? What do you think of it?
- Does any property need to be sold to pay for the protected person's expenses? Have you made a record of how you determined the value of the property? If you sold the property to a friend or family member (yours or the protected person's) did you receive full value?
- Does the protected person want to give that property to a specific people when s/he dies?

(12) Education, Recreation and Work for the Protected Person

- What are the protected person's goals? What does s/he want to do?
- Are there opportunities available to help achieve those goals?
- Does the protected person have the knowledge, skills and abilities to take advantage of those opportunities?
- What steps are possible to help develop the protected person's knowledge, skills and abilities.
- Can the protected person afford the opportunities?

(13) Ending a Guardianship or Conservatorship

- Is the protected person getting better at making and communicating decisions? Worse?
- Would s/he be harmed if the guardianship or conservatorship were ended? If your authority were more limited? Do you need authority you do not have?
- When the protected person dies, who will you notify?
- Has the protected person made arrangements for a funeral and burial, cremation or donation? Do you know his or her preferences? Does the protected person have family to make and carry out the arrangements?

(14) Moving a Guardianship or Conservatorship

- Do you expect that you will move? Will you be able to serve as guardian or conservator from the new location?
- Do you expect that the protected person will move? What would prompt a move? What does s/he want?
- If you or the protected person move, who will you notify?

(15) Resolving Conflicts with Family Members and Others

- What do family members and others who are part of the protected person's life think about the decisions that you have made?
- Have you explained your decisions to them?
- Does the protected person want you to involve them in discussing options and decisions?
- How can you best resolve conflicts? Mediation? Counseling?

(16) Resources to Help Guardians and Conservators

- Do you understand your duties as a guardian or conservator?
- Do you want those duties?
- Do you know where to turn for help when you need it?

(17) Resignation or Removal of a Guardian or Conservator

- Do you understand your duties as a guardian or conservator?
- Do you want those duties?

(18) Respecting the Protected Person's Rights

- Are there activities the protected person wants to maintain or avoid?

- Are there relationships s/he wants to maintain or avoid?
- Are there religious or cultural traditions or practices that s/he wants to maintain or avoid?
- Are there any other preferences that s/he has expressed?

(19) Contacts

- What is the planned nature and frequency of communications with these people?
- Do you anticipate significant disputes about your decisions? How will you handle these differences of opinion?
- Who will you notify if the protected person moves, dies or has a significant change in circumstances?

(a) Family and Friends

- Spouse _____
- Child _____
- Siblings _____
- Parents _____
- Others _____

(b) Providers, Advisors and Decision Makers

- Guardian _____
- Conservator _____
- Health Care Agent _____
- Trustee _____
- Lawyer _____
- Banker _____
- Physician _____
- Psychiatrist/Psychologist _____
- Dentist _____
- Optometrist _____
- Pharmacy _____
- Physical Therapist _____
- Speech Therapist _____
- Vocational Therapist _____

- Social Worker _____
- Residence Facility Administrator _____