Care Management Checklist

Heartland Aging Advocates

Care management may be helpful when your loved one needs more support, coordination, and advocacy than family members or providers can reasonably manage alone.

Use the checklist below to help determine if care management is the right decision for you and your family. If 3 or more indicators are checked, then referral is recommended.

Medical Complexity Indicators

If your loved one has:

- ❑ 2 or more chronic conditions
- ❑ Frequent medication changes
- ❑ Recent hospitalization or emergency room visit
- ❑ 2 or more hospitalizations in 6 months
- ❑ New diagnosis impacting function
- ❑ Complex specialty care coordination
- ❑ Poor follow through with medical recommendations
- ❑ Declining cognition affecting medical decision making

Functional and Safety Indicators

- ❑ Recent fall or near fall
- ❑ Change in mobility status
- ❑ Unsafe living environment
- ❑ Concerns about driving safety
- ❑ Difficulty managing medications independently
- ❑ Wandering or elopement risk
- ❑ Inconsistent supervision
- ❑ ADL decline requiring increased oversight

Cognitive and Behavioral Indicators

- ❑ New or worsening memory concerns
- ❑ Confusion impacting safety
- ❑ Behavioral symptoms of dementia
- ❑ Resistance to care
- ❑ Paranoia, agitation, or personality changes
- ❑ Poor judgment impacting finances or health

Family System Indicators

- ❑ Family conflict regarding care decisions
- ❑ Long distance family involved
- ❑ No clear decision maker
- ❑ Caregiver burnout
- ❑ Differing expectations among siblings
- ❑ Difficulty navigating healthcare system

Financial and Legal Indicators

- ❑ Power of attorney unclear or absent
- ❑ Concerns about financial exploitation
- ❑ Difficulty managing bills
- ❑ Estate planning not aligned with current health
- ❑ Trust officer or attorney requesting oversight
- ❑ Complex benefits coordination

Transition and Placement Indicators

- ❑ Considering assisted living or memory care
- ❑ Discharge from hospital or rehab
- ❑ Hospice or palliative discussions beginning
- ❑ Repeated failed discharges home
- ❑ Home care hours increasing rapidly

Home Care Specific Indicators

- ❑ Scope creep beyond caregiving
- ❑ Family expecting clinical oversight from aides
- ❑ Caregivers reporting safety concerns
- ❑ High turnover due to client complexity
- ❑ Frequent schedule instability
- ❑ Owner or DON spending excessive time on one case

Immediate Referral Indicators

Consider care management promptly if your loved one is experiencing any of the following:

- ❑ Immediate safety concerns
- ❑ Repeated crisis calls or emergencies
- ❑ An unclear or poorly coordinated medical plan
- ❑ Adult Protective Services (APS) involvement
- ❑ Rapid functional decline