Home Care Planning Checklist

A step-by-step guide for families exploring in-home care options

Whether you are just starting to explore options for a loved one or preparing for care you may need yourself, this checklist walks you through the key decisions in planning for in-home care, organized in the order most families find them.

1. Assess Current Needs

- List daily activities that require help (bathing, dressing, grooming, toileting, eating)
- List household tasks that require help (meal prep, light housekeeping, laundry, transportation)
- Note any mobility challenges (walker, wheelchair, history of falls)
- Note memory or cognitive changes (confusion, forgetfulness, wandering)
- Review current medications and how they are managed
- Identify medical conditions that need monitoring (diabetes, heart disease, COPD, etc.)

2. Define the Level of Care Needed

- Companion care — socialization, light support, safety supervision
- Personal care — hands-on help with bathing, dressing, and hygiene
- Specialized care — dementia, Alzheimer's, or post-hospital/rehab support
- 24-hour or live-in care — continuous supervision and support
- Respite care — short-term relief for a family caregiver

> *Care needs often change over time. Choose a provider who can adjust the plan of care as needs increase, rather than starting over with a new agency later.*

3. Plan for the Cost of Care

- Review long-term care insurance policy details and benefit triggers, if applicable
- Check VA Aid & Attendance eligibility for veterans and surviving spouses
- Ask about Medicaid waiver programs and eligibility in North Carolina
- Request a written estimate of hourly or daily rates from any provider you consider
- Clarify minimum hours, scheduling, and any additional fees
- Set a monthly care budget and identify funding sources

4. Gather Legal & Medical Documents

- Durable power of attorney (financial)
- Healthcare power of attorney / healthcare agent designation
- Advance directive or living will
- HIPAA release authorizing caregivers to speak with providers
- Current medication list with dosages and schedule
- List of physicians, specialists, and pharmacy contact information
- Insurance cards and policy numbers

5. Evaluate Home Care Providers

- Confirm the agency is licensed, bonded, and insured in North Carolina
- Ask how caregivers are screened, background-checked, and trained
- Ask who creates the care plan and how often it is reviewed
- Ask how the agency handles caregiver call-outs or scheduling changes
- Ask what safety monitoring or check-in technology is available
- Request references or reviews from current or past clients
- Clarify the process for starting care and how quickly it can begin

> *Home Helpers® Home Care's Cared-4■ program pairs a personalized care plan with the Direct Link® voice-activated monitoring system, so families have an added layer of safety and peace of mind between caregiver visits.*

6. Prepare the Home

- Walk through the home for fall and safety hazards (see our Home Safety Assessment guide)
- Identify any equipment needed: grab bars, shower chair, raised toilet seat, ramp
- Set up a central, visible location for medication and care schedules
- Post emergency contact numbers near the phone and on the refrigerator

7. Set Up Ongoing Family Communication

- Decide how often family will receive care updates and from whom
- Identify one point of contact to coordinate with the care team
- Schedule a care plan review at 30, 60, and 90 days
- Keep a shared list of questions or concerns to raise at each review

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Home Helpers® Home Care of Garner & Fuquay-Varina builds a Cared-4SM care plan around each client's specific needs, combining Personal Care, Nutrition, Wellness Calls, and Safety & 24-Hour Monitoring. We welcome the chance to answer questions as you work through this checklist — reach out any time.