

Needs Assessment & Care Planning

- We begin by interviewing a new client and that client's support team including involved family members, decision makers, physicians, social workers, chaplains, retirement facility staff and/or caregivers to determine the client's current needs, capabilities, desires, challenges and opportunities.
- We collaborate with relevant team members to develop a comprehensive written Client Care Plan.
- We regularly review and update this plan with clients support team as appropriate.

Client Advocacy

- We facilitate effective communication amongst client and team members, in service of the client's best interests.
- In this process, we maintain client confidentiality in accordance with HIPPA guidelines, disclosing only information that is necessary and appropriate.

Emotional Health & Well-being

- We monitor our client's mood/affect and socialization as needed via direct contact, observation of client interactions with others and check-ins with in-home caregivers and/or facility staff.
- We encourage our client's participation and engagement in activities which promote physical and cognitive stimulation to avoid client isolation, loneliness and depression.
- We mediate relationships with client's significant others, responding in a timely manner to their questions and concerns in relation to client's care needs.
- We elicit sharing of client stories through active listening, empathy, and reminiscence therapy, as appropriate.

Physical Health & Well-being

- We manage client's medical and dental appointments, scheduling, transportation, etc.
- We accompany clients to medical appointments as needed.
- We confer with physicians and other health care professionals to monitor client's physical well-being.
- We ensure availability of medications prescribed by client physicians as well as OTC supplements.
- We monitor client's health status including eating habits and nutrition, and significant weight changes.

Household Services

- We evaluate safety and maintenance needs in the client's living environment.
- We inventory and secure our client's valuables, such as jewelry and art, as needed.
- We inventory, when necessary and appropriate, a client's personal property, clothing, shoes and toiletry items, noting client's preferred styles, colors, sizes, brands.
- We manage client's needs for any such personal items, arrange shopping trips.
- We manage all aspects of a client's move, if necessary, to a more appropriate living situation.

Basic Financial Services - As directed by client or designated decision-maker

- We help clients with bill-paying, monitoring checkbook balances.
- We process clients' insurance claims.
- We serve, when asked, as Durable Power of Attorney for Health Care.
- We serve, when asked, as Conservator of Person.