

# *Aging Wisely*<sup>TM</sup>

Comprehensive Care Management and Consultation

## Assessment and Evaluation

**Client Number and Name:** #1221 John Smith\*

**Assessment Date:** February 5

**Assessed By:** Sue, Aging Wisely Care Manager

## Demographics

**Current Living Arrangement:** Own home  
**Address:** 275 West Dr., Clearwater, FL 33761

**Phone:** (727)555-5555

**DOB:** 2/1/29

**Age:** 81

**Social Security #:** 222-22-1111

**Marital Status:** Widow

**US Citizen:** Yes

**Veteran:** Yes, Army

**Religious Preference:** Methodist

**Church Affiliation:**

Clearwater United Methodist

## Emergency Contacts:

1. Pam, daughter

**Home Phone:** (813)-555-5555

2. Jan, daughter

**Cell Phone:** (813)222-2222

3. Bob, son

**Home Phone:** (813)444-4444

**Work Phone:** (888)900-9000

**Home Phone:** (888)888-8888

## Medical Information

**Primary Physician:** Stanley Moore, Cardiologist **Phone:** (727)777-0000  
**Address:** 2000 West Bay Dr., Largo, 33770

**Secondary Physician:** Dr. Anthony Stephens, Psychiatrist  
**Address:** 1000 County Rd. 1, Dunedin

**Phone:** (727)888-0000

**Secondary Physician:** Dr. John Smits, Urologist  
500 Jeffords St., Clearwater

**Phone:** (727)-999-0000

**Diagnosis:** Coronary Artery Disease

**Medical History (including previous surgeries):** Redo coronary artery bypass February 1993, left internal carotid endarterectomy July 1996, right internal carotid endarterectomy November 1180 Ponce de Leon Blvd., Suite 701 • Clearwater, Florida 33757 • [www.agingwisely.com](http://www.agingwisely.com)  
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1996, bladder cancer early 1980s, cataracts removed in both eyes, right eye lens replacement, sternum removed

**Allergies:** Penicillin

**Prescriptions:**

<u>Medication</u>	<u>Dosage</u>
1) Pravachol, 40mg	one tab daily
2) Buspar, 15mg	1/2 tab in a.m., 1/2 tab at bedtime, 1/3 tab during the day
3) Norvasc, 10mg	one tab daily
4) Aspirin, 81mg	one tab daily
5) Prostata	one tab daily
6) Restoril, 30mg	one tab at bedtime
7) Seconal, 100mg	one tab at bedtime as needed

**Legal Information**

Family reports all documents up to date.

<b>Health Care Surrogate:</b> Yes, Janet	<b>Copy of Document on File:</b> No
<b>Living Will:</b>	<b>Copy of Document on File:</b> No
<b>Durable Power of Attorney:</b> Yes, Janet, Rich, & Karen	<b>Copy of Document on File:</b> No
<b>Do Not Resuscitate Order:</b> N/A	<b>Copy of Document on File:</b> No
<b>Estate Plan (Will/Trust):</b> Will completed.	<b>Copy of Document on File:</b> No

**Attorney:** John Van Eli  
**Address:** 1000 Gulf to Bay Blvd.

**Phone:** (727)444-0000

**Burial Arrangements**

**Plot Location:** West Gardens

**Prepaid Arrangements:** yes, funeral prepaid and daughter Pam has all information

**Social History**

**Past relationships, occupations, interests:** Mr. Smith was married 57 years to Genie a retired registered nurse. He worked for General Motors for 25 years, rising to the title of VP of Sales. He was forced to retire early due to his health and moved to Florida to "get away from the automobile industry". He and Genie raised 7 children. Three of the children reside in the community; the others are in various states.

**Psychosocial**

**Interests:**     **Past:** golf, stocks, train set, church                     **Present:** stocks  
**Self Esteem:** Appears intact  
**Recent Stress:** Wife's death  
**Grieving Behavior:** Episodes of crying  
**Judgement:** Good, episodes of judgement being compromised  
**Concentration:** Appears intact  
**Relationships with Family:** Excellent

## Cognitive Abilities

**Oriented (Person, Place, & Time):** Oriented times three

**Mood:** Appears appropriate

**Confused:** No symptoms noted

**Anxious:** History of anxiety attacks

**Depressed:** Potential for depressive mood

## Memory

**Short Term:** Family notes some episodes of compromised short-term memory

**Long Term:** Appears intact

## Activities of Daily Living

	Independent	Assist	Total Assist
<b>Bathing/Grooming:</b>	X		
<b>Dressing:</b>	X		
<b>Toileting:</b>	X		
<b>Ambulating:</b>	X		
<b>Eating:</b>	X		
<b>Meal Preparation:</b>		X	
Mr. Smith will warm up prepared meals for himself but does not cook.			
<b>Communication:</b>	X		

**Special Diet:** N/A

**Weight:** According to Mr. Smith he is gradually losing weight.

## Home Environment/Safety Issues

**Stairs:** Yes, according to Mr. Smith he climbs the stairs approximately one time per week.

**Emergency Response System:** Yes **Provider:** Lifeline **Phone:** (800) 635-6156

**Lighting:** Good

**Scatter Rugs:** Bathroom

**Grab Bars in Bathroom:** Yes

**Other Areas:** N/A

**Smoke Alarm:** Yes

**Telephone Next to Bed:** Yes

**Outdated Medicines:** None noted

**Emergency Numbers Posted:** No list observed

**Hurricane Supplies & Evacuation Plan:** Family will assist during an evacuation

## Presenting Problems/Issues

**Identified by Client:** Mr. Smith reports he wants to continue residing in his home. He further stated he wants to "give it a try" residing independently with some assistance and support.

**Identified by Family:** In speaking with the family, all the siblings seem to generally agree about several main concerns about their father. First, they want to ensure that he is safe in the home, particularly as they have some concerns about his steadiness on his feet and some short-term

memory issues. They are concerned about the pool in particular, as Dad has fallen into the pool and injured himself before. Additionally, the children noted some concerns about their father's driving, although they have taken safety precautions so that he does not drive at night or in high traffic areas. Night driving and driving out of his local neighborhood are the biggest concerns and there are some additional concerns about possibly becoming lost. One of the other key issues is that their father does not feel safe alone at night. He has had this fear for many years, since developing his heart condition. They feel it is presently important to him to have the security of a caregiver at night, simply to be there in case he needs someone.

Second, they are concerned about their father's general daily pattern and the changes he is facing. Their mother was his 24-hour companion and primary contact for many years. Their concerns in this area appear to be twofold. First are daily tasks, such as preparing meals and tending to the household. Second, are Dad's social needs and potential for depression. The siblings all noted the importance of their father having stimulation and activities. They also noted that he is a very social person who enjoys conversation, but may be reluctant to instigate relationships. He has been very involved in his church, but that had decreased over the past couple years due to some changes in the church leadership and Mrs. Smith's declining health.

The siblings would like their father to investigate alternate living situations. However, they do acknowledge that their father is somewhat hesitant about a move and that there are grief issues to deal with at present. They are amenable to considering this as a future option when their father becomes ready to consider it.

**Identified by Care Manager:** There are a number of immediate concerns although this is a difficult time to assess Mr. Smith's needs due to the recent loss of his wife. Currently, the siblings have been alternating caregiving responsibilities, staying with their father, and helping with the upkeep of the house and day-to-day concerns, as well as spending nights with him. They acknowledge that it is important to be cognizant of their own familial duties and responsibilities. On-going care provided by family members could pose issues related to caregiver burnout, fostering Mr. Smith's dependency on others, sibling rivalry, and harm to personal relationships. Without a fulltime caregiver, Mr. Smith's safety becomes a concern. Although we applaud Mr. Smith's use of his lifeline, there are numerous safety issues to address. Finally, it will be extremely important to slowly build Mr. Smith a social support system in addition to his family.

### **Recommendations/Plan of Action**

In preparing this assessment a few important factors continue to emerge. First, Mr. Smith and the Smith family have been through a very difficult month with the loss of their wife/Mother. The plan must be viewed as a work in progress, as Mr. Smith continues to adjust, changes will need to be made to the plan. Second, although family member's willingness and commitment to care for their father is commendable it cannot continue indefinitely. We applaud the support and care provided by family members but must recognize each has their own families and responsibilities to consider. It is also important that adult children be able to enjoy their role as "child", allowing professionals to provide specific services. Third, the need for a routine is essential. Most individuals thrive on stability and routine. It will take everyone involved to help develop a comfortable, beneficial routine for Mr. Smith. With the support of his family and some professional assistance, Mr. Smith should flourish in any environment.

1. Recommend Mr. Smith have a home health aide with him 18 hours per day, from 3:30pm to 9:30am. The home health aide would be responsible for several tasks including but not limited to:
  - Meal preparation
  - Supervising consumption of medications
  - Household laundry/ironing
  - Light housekeeping (i.e. vacuuming, dusting, kitchen clean up, etc.)
  - Transportation as Mr. Smith needs
  - Transportation and accompaniment to grocery store and other errands
  - Transportation to outings as Mr. Smith instructs
  - Transportation to physician appointments (transportation needs between 9:30am and 3:30pm can be arranged in advance with home health aide, a family member may be able to assist, or a contract with a cab company can be established)

Suggested Providers:

**Bay Home Health**                      **Contact Person:** Mary                      **Phone:** (727)777-7777

\$16.25/hour (any time, only changes for major holidays)

use one caregiver for 1<sup>st</sup> shift and another for second, different person on the weekends; strive for good match and consistency.

18 hours x \$16.25/hour = \$292.50/day x 30 days = **\$8775. per month**

24 hours x \$16.25/hour = \$390.00/day x 30 days = **\$11700. per month**

**Coast Health**                              **Contact Person:** Catherine                      **Phone:** (727)888-8888

\$12.50/hour for companion (can do light housekeeping, meals, etc.)

\$14.50/hour for CNA (Certified Nursing Asst.)

18 hours x \$12.50/hour = \$225.00/day x 30 days = **\$6750. per month**

24 hours x \$12.50/hour = \$300.00/day x 30 days = **\$9000. per month**

Other options:

Live-in: \$125/day x 30 days = **\$3750.00/month + food/groceries**

**Pros:** less expensive, would be able to do all housekeeping, assist with driving, appointments, etc.

**Cons:** finding good match very difficult, one person can have undue influence on the client thus we always recommend at least 2 caregivers working within one household.

**Additional Notes:** Recommend considering decreasing Dolores to one time per week. We recognize the long-standing relationship but must note the home health aide can complete ironing quietly during the night while Mr. Smith sleeps. Also prices for a "home health aide" and a "companion" were provided. A home health aide can assist with hands-on, personal care such as bathing, dressing, etc. Although these services are not currently needed, it is often a good idea to build a relationship with someone that could be involved long term. A companion cannot provide hands on care.

2. Recommend Mr. Smith and his family investigates alternative living opportunities. Specifically recommend touring the following communities:

- Allegra of Clearwater                      Phone: (877)555-1212  
1755 Lake Rd., Clearwater, 34688

1180 Ponce de Leon Blvd., Suite 701 • Clearwater, Florida 33757 • [www.agingwisely.com](http://www.agingwisely.com)  
Phone 727-447-5845 • Fax 727-461-0001 • Toll Free 1-888-807-2551

Notes: new community, independent living only, price range: \$1650 - \$2800

- Oaks of Palm Harbor Phone: (877)200-2000  
1900 East Lake Rd., Palm Harbor, 34684  
Notes: independent & assisted living, price range: \$2200 - \$4300
- Branches Assisted Living Phone: (727)200-1000  
2000 Tampa Rd., Palm Harbor, 34684  
Notes: assisted living only, AW has several clients residing there who are happy with services and staff, price range: \$2575 - \$4000
- Palm Village Phone: (727)444-3333  
300 Seminole Blvd., Largo, 33771  
Notes: independent & assisted living, price range: \$2060 - \$4000

Note: Care managers have been successful at negotiating lower rent fees with communities.

3. Recommend the completion of a weekly calendar that will address Mr. Smith's social, emotional, spiritual, intellectual, and physical wellbeing. The calendar should be posted in an accessible place for all to view. Suggested activities/outings include, but are not limited to:

- Dunedin Senior Center (see attached)
- Hospice General Bereavement Support Group, Phone: 588-2812, Palm Harbor office (corner of Tampa Rd. & West Lake Rd.), next group begins March 20<sup>th</sup>, each Thursday from 10:00am to 12:00pm for 6 weeks. Call Hospice to register.
- Church Men's group (see attached)
- Bridge group
- Dinner outings with friends
- Dining Centers (see attached), transportation is provided
- Daily walks/exercise- informal & formal (see attached)

4. There are several recommendations regarding safety concerns. They are as follows:

- Pour medications into a weekly "medication planner". This allows for accurate consumption of medications. Also utilize website [www.mypillbox.com](http://www.mypillbox.com) to provide monthly medication charts, wallet size list of medications, etc. (see attached).
- Remove scatter rugs in the bathroom, they pose a fall risk.
- Install a pool fence. It was reported Mr. Smith had fallen into/around the pool on several occasions. A pool fence would help decrease the risk of accident.
- Post reminder notes throughout the house. For example, post a note on the screen door stating "DANGER POOL", etc.
- Complete the information for the Vial of Life program (see attached). This is a program that alerts emergency medical professionals who come to your door where to find important medical information.
- Program all children's numbers into Mr. Smith's cell phone. He should be instructed on how to use it and encouraged to take it everywhere he goes.
- Discourage use of the stairs by roping them off and bringing down any items Mr. Smith may need and attempt to retrieve. Remove or secure all ladders and step stools to remove/discourage their use.

- Complete attached Check Your Own (Driving) Performance pamphlet attached. Complete the AARP “55 Alive Course”, contact AARP for class schedule at 571-2277.
- 5. Recommend care manager continue to assist Mr. Smith with the development of a comfortable weekly routine, securing appropriate home health aides, touring alternative living communities, and securing his home. Care manager also recommends routine visits to monitor Mr. Smith's progress towards goals and provide proactive recommendations as need arise.
- 6. Recommend a Health File be created for Mr. Smith (see attached). A Health File provides accessible, important medical information when needed and allows a system for keeping medical information accurate and up to date. Care manager can set up a Caregiver’s Touch account for the client and assist the family in creating a personal, online record that will be useful for the client and family caregivers.

Sincerely,  
Liz Barlowe, MA, CMC  
Shannon Martin, MSW, CMC

\*names of individuals and facilities have been changed