

Memory Joggers for Documents to Organize - So Others Know When You're Unavailable

- 1 A "READ ME FIRST DOC." General letter of instruction how to handle things, key people to contact
- 2 A letter describing the location of all documents, assets. property, items on loan to family / friends
- 3 Authorization to Release Protected Healthcare Information form. Universal Patient Authorization Form
- 4 Bank Statements 6 months, checking, savings, money market, CD
- 5 Bill payment dates, method, address, contact numbers
- 6 Biography – Profile of preferences
- 7 Child-support payment, receipts, court decrees
- 8 Combinations to locks, safes, briefcases
- 9 Contacts – emergency, professional, personal, family, friends
- 10 Contracts – equipment, services, time share, hearing aids, storage unit
- 11 Credit Cards, Credit Card statements, Credit Report
- 12 Contribution,
- 13 Deeds to Housing, land and cemetery plots
- 14 Divorce Decree / Papers / Marriage license
- 15 Do-not-resuscitate order - DNR
- 16 Durable power of attorney – health-care
- 17 Durable power of attorney - financial
- 18 Escrow mortgage accounts, House Settlement Documents, Property Tax
- 19 Funeral / Cremation Arrangements, Contracts & Receipts
- 20 Health Care Surrogate ?POA Health Section
- 21 ID Picture, Birth Certificate, Passport, Military ID, Drivers License
- 22 IRA Traditional / IRA Roth / 401K, Pension.
- 23 Insurance – Medical, Drug, Dental, Optical, Auto, House, Life, Boat, Disability, Long Term Care, Hobby
- 24 Inventory – Tangible Assets - Jewelry, Equipment, Collections, Coins, Guns, Gun Permits
- 25 Law suit settlements and agreements, income or liabilities from law suits
- 26 Legal "qualified domestic-relations order" judicial order for property division
- 27 List of any debts you owe to avoid surprising your family.
- 28 Living Will detailing your wishes, advanced health directive.
- 29 Loans you have made to others. Private loans
- 30 Loans you owe – car, boat, trailer, travel,
- 31 Login User Name & Password -Computers, Phones, Online Acct.
- 32 Assets and liability + income and expense report
- 33 Medicaid Card and Documents
- 34 Medical Assessment AHCA 1823 – needed for facility acceptance,
- 35 Medical History of self and family, TB test, Inoculations, Medications
- 36 Medicare Card, Supplemental Insurance Card and bill
- 37 Membership Cards for Clubs, Fraternity, Sorority, Train Show
- 38 Mortgages, Notes, other income sources
- 39 Online Pay Pal account details – linked accounts
- 40 Partnership and corporate operating agreements
- 41 Post Office Box agreement, Safe-deposit boxes agreements
- 42 Proof of Ownership – Titles, Receipts,
- 43 Repair records for vehicles, house, yard equipment,
- 44 Social Security Card, Social Security 1099, awards and benefit grants
- 45 Stocks, bonds, annuities, mutual funds, brokerage accounts, statements
- 46 Tax - Returns for Most recent three years plus current year receipts
- 47 Titles & Registration to Vehicle, Trailer, Boat, Motorcycles, Equipment
- 48 Trust – Revocable living trust, Irrevocable Trust, Trustee info for another trust
- 49 Veteran Service Records and Documents, Honors, Awards, Discharge -DD214,med records
- 50 Warranties – Extended Auto, Appliances, Equipment, Roof, Water heater, Service agreements
- 51 Will – Last Will and Testament, Bequests
- 52 Pet information – Profile, preferences, – vet, medical history, insurance



Document Storage



Freezers Seldom Burn





Getting Your Affairs In Order

LEGAL Documents- Find an attorney 850-561-5600 Free legal 352-629-0105x2915 www.clsmf.org
- Durable Power Of Attorney Vs POA Document - Last Will and Testament
- POA wealth – Act for you (You retain authority) - Trust - authority to manage assets
- POA health surrogate designation - capacity - Baker Act – safety for all, risks
- Guardianship – Person / Estate / Person + Estate - Conservator of estate, not medical
- Advance Directives- organ, Liv Wil, Surr - DNR yes / no - revocable
- Living Will –end-of-life health care desire - Five Wishes Document caringinfo.org
-Attorneys- Samantha Shealy Rauba 789-6520 Shannon Mulkey 732-5900 Absolute Law 205-4455

FINANCIAL - Private, Long Term Insurance, V.A., “ Elder Options 800-963-5337, Medicaid, Senior Services”

Terms – AHCA = Agency for Health Care Admin 888-419-3456 <http://www.floridahealthfinder.gov/index.html>
ADL's - eating, bathing, getting dressed, toileting, transferring and continence. Lose of 2 often qualifies you for help
IADL Instrumental Activities of Daily Living exp: use phone, pay bills

Services - Companion Care – (non-medical / non contact)-vs-Home Health Aid – (ADL's /IADL – med and physical help
CNA – Certified Nursing Assistant, train 40 hrs & licensed , all basic assistance non-medical,
Terms - Independent vs Agencies, Agency Types (referral vs agency employees)

Home -Marion County Senior Services – free and fee, meals housekeeping, respite - (352) 620-3501
Hospice of Marion County Transitions – free respite, supplies, equipment – 352-854-5200
Independent - \$10 - \$20 - *Call out – *craigslist, doctors, pharmacy, friends, flexible care types
Background, Employee vs Subcontractor, Bookkeeping, define acceptable activities
Agencies – \$15 - \$25 Minimum number of hrs & days, , Call-out Replacement, licensed care type
Veterans Serv - Neil 369-332x1596 Ms Stewart 548-6000x10339 Vet Help Vet 433-2320 – Sliding Scale

Area – Silver Saints Ocala West United Methodist Church, Rev. Drena (352) 854-9550 FREE Respite
Blessed Trinity Day Care (352) 616-7159 \$12hr \$65 day includes lunch 44 SW 15th Pl
Day care at Assisted living facilities – If they have vacancies price varies \$15
Marion County Senior Services - Lunch and activities (352) 620-3501 1101 SW 20th Ct

Facilities - *Private Pay *Long Term Insurance Terms ALF, AFCH, NH,
Medicare pays for skilled care. Dementia is non-skilled care so no long term care coverage
Nursing Home Skilled / Rehab 20 @ 100% 80@80% then 0%
Medicaid will pay for long term care retroactively up to the first of application month. 100% -SS ck
Medicaid Application - yourself, facility, medicaid specialist, knowledgeable elder attorney
Applicant may qualify IF =< \$2000 in assets, Income up to =<\$2313.00
If funds exceeds requirement - see elder attorney or medicaid specialist – investigate the following
*Spousal Refusal *Transfer Assets to spouse *Service Contract *Asset Trust *Income Trust *
Create a Net Worth doc - what you have, where its at, why, controlling person - don't close spouse acct
Spouse Transfer assets, Annuities, Insurance ownership and beneficiary, Personal Services Contract
Medicaid – Senior Services - Home Medicaid vs Facility Medicaid / Household (couple) vs Individual
Medicaid Long Term Care/Elder Affairs in Ocala (352) 620-3088 Elder Helpline at 800-262-2243
Facility Complaints 888-419-3456 Medicaid complaints 877-254-1055 <http://ahca.myflorida.com>
Medicaid - Rhonda Stetter 352-418-1011 Senior Solutions - Arika McCormack 941-2015871

MEDICAL Documents- HIPAA - Release Medical Information <http://ahca.myflorida.com/hipaa/pdf/Authorization.pdf>
Document medications and behavior by event, hrly, daily bases - so others know what's happening
Have copy of the dementia diagnoses with you / in glove box too - So authorities will cooperate
Get a doctor with whom you are comfortable – GP / Neurologist / Gerontologist / Psychologist
"AHCA Form 1823" (rev 2017) – Need for facility - 60 days prior to 30 after admittance -Hosp 1023
Diagnose by Doctor / Research Renstar Medical Research (352) 629-5800 * Bioclinica 352-732-9643
Anesthesia - “known to cause or escalate cognitive impairment in some people” Jytte Lokvig, PhD
Doctors that come to your home – covered by medicare – Labs, Xrays, Exam, Shots

Life Force Health Care (352) 873-3800 Mobile Physician (855) 232-0644 (travel fee)
Absolute Health (352) 854-5530 charges travel fee \$75 adjustable

Medications <http://www.webmd.com/>

Medical Equipment - Accent Medical Equipment (352) 622-7260 (owned by Hospice OMC)

Respite Care – Vacation, Weekends Away, Facilities, In home caregivers,

*****Caregiver 24 hour Hot Line -Alz.org message board – Talk to Someone 800-272-3900*****

Get legal, financial, medical advise from qualified experts.....not me