

Care Priorities Worksheet

Step 1: Determine the Care Period(s)

Today's Date:

Current Care Period:

Reevaluation Date:



A Care Period is the foreseeable period before the next change in health, financial, or other status that modifies the care needs and priorities. It can be as short as days (ie during short term rehab), or for years. If you can't anticipate any future changes, then you need to further explore your situation.

Instructions: list the period in days/months/years, summarize the period's attributes & goals for care, and cutoffs of each Period. Common triggers can include (but are not limited to) serious accidents, loss of mobility, progression of disease, death of a spouse, and budget changes.

Period	Summary of care goals, needs, ideal care arrangement, budget, etc.	Trigger(s) to start next period
1		
2		
3		

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Step 2: List & Choose Care Factors

Today's Date:

Current Care Period:

Reevaluation Date:



Care Factors are attributes that apply to everyone, but the specifics vary from person to person, and even the same person at different Care Periods. The below are the most common Care Factors, but the depth/amount/type etc. must be defined according to your situation.

Instructions: review the below Care Factors, identify any that you think are important, mark them, and try to list specifics about them for the Care Priority evaluation in Step 3. The more specific you can be the better. Example: "needs assistance with toileting overnight at home."

Related to Care Needs	Care Setting & Comfort	Other Services
Staying together with a spouse:		Couples care:
Price:		Meal prep & cleanup:
Caregiver ratio:		1-to-1 companionship:
Amount of mental stimulation:		Shopping:
Amount of exercise:		Housekeeping:
Amount & type of socialization:		Laundry:
Profile of other people sharing the care, if any:		Medications management:
Care is available now, or must wait til later:		Transportation:
Type of care option/service:	Size of setting:	Accompaniment to medical appointments:
Current care needs to be accommodated:	Location:	Accompaniment to social outings:
Future care needs to be accommodated (if known):	Look & feel of care setting:	Grooming services:
Duration of care (hrs/day, days/wk):	Familiarity with care setting:	Other:
Amount & type of caregiver supervision/assistance:	Level of privacy:	
Size of caregiver's support network:		

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Step 3: Qualify Factors as Priorities

Today's Date:

Current Care Period:

Reevaluation Date:



Not all Care Factors are actual Care Priorities. For a Factor to be considered a Priority, at minimum it must pass three evaluation questions. If the answer is not 'Yes' to all three questions, then it's not actually a Priority that should take precedent over other Factors while searching for care.

Instructions: List selected Care Factors from Step 2 and evaluate. Cross out any that do not pass the qualification test.

	Selected Care Factor (from Step 2)	Critical to stakeholders' well-being?	Will it be safe/lead to more safety?	Can we afford it for the care period?
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				

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Step 4: Rank Priorities

Today's Date:

Current Care Period:

Reevaluation Date:



To use Care Priorities in a search for care, they should be ranked. Each Stakeholder should rank his/her choices to make the process clearer and more streamlined. The fewer priorities, the simpler the process. Having many priorities may make finding care services harder.

Instructions: List Priorities from Step 3 and rank by urgency & inflexibility. A priority that is more urgent takes precedence over others that are inflexible (ie "mom does not want to move out of the house and into a care facility"). A lower-ranked 'need' should be prioritized over a higher-ranked 'want.' A priority that maintains a poor care situation needs to be reconsidered. A priority that meets current needs but jeopardizes future options needs careful consideration.

Care Priority	Urgency Rank (1 – most urgent)	Inflexibility Rank (1 – most inflexible)	Is it a 'Need' or a 'Want'?	Maintains/Improves /Jeopardizes future options?	Final Rank #
1					
2					
3					
4					
5					

**From this point take your Care Priorities to get agreement with Stakeholders, then search for an appropriate care option.
Good luck!**