



Caring for a Loved One From Afar

If you live a fair distance away from an older loved one, you may have unique caregiving concerns. This guide provides helpful tips and information on assessing your loved one's needs and making suitable care arrangements, even from a distance.

Assessing the Needs of Your Loved One

Although distance may prevent you from physically checking on your loved one regularly, there are other ways to assess your loved one's ongoing needs. Begin by establishing an informal network of neighbors, friends or family members who are willing to check on your loved one periodically. Select trustworthy people, and encourage them to call you (collect, if necessary) if they are concerned that your loved one's health or safety is in any way compromised. Give them your contact information and keep a list of their names, addresses and telephone numbers handy.

Additionally, stay in close contact with your loved one yourself (via phone, fax or e-mail). Consider setting up a system whereby you must contact one another each day (perhaps at a specified time). If you don't hear from your loved one—and can't get in touch with him or her yourself—alert a neighbor or the police department so they can check on him or her for you. Keep the lines of communication open and ask your loved one pointed questions about his or her concerns, needs, health, etc. Make sure your loved one doesn't hide the truth to prevent you from worrying, or embellish stories to get you to come visit. An open and honest relationship is the key to a successful long-distance relationship.

Occasionally, you may need to travel to assess your loved one's physical and mental health, or to respond to an emergency. To prepare, set aside savings or set up an emergency travel fund. In addition, plan your visits carefully. For example, if you want to investigate care options (such as home health care agencies, housing options, etc.) while you're visiting, set up appointments well in advance. It may also be wise to make dental and doctor appointments for your loved one so you can attend with him or her while you are visiting.

Once you arrive, carefully assess your loved one's situation. (For detailed information on how to assess your loved one's needs, please refer to the guide *What You Need to Know About Becoming a Caregiver*.)

Care Options

Once you have a better feel for your loved one's needs, you can more accurately determine what type of care is required. If your loved one is still fairly independent, you may want to sign him or her up for support services (e.g., grocery delivery, home-delivered meals, or a homemaker). If your loved one requires help with activities of daily living, he or she may benefit from home care on a part- or full-time basis. And if your loved one requires 24-hour supervision, it may be time to consider an alternative living arrangement. For information on supportive services and alternative housing arrangements, please refer to other guides in our educational series.

Professional Care Management Services

If you are unable to travel to your loved one, or you would feel more comfortable having a professional assess your loved one's needs, consider privately hiring a professional care manager (PCM). These professionals can assess an individual's situation, prepare a care plan, and provide supervision and monitoring services as necessary. A good PCM will work to keep an individual in the least restrictive environment for as long as possible while also anticipating future needs and preventing crisis situations.



A PCM can typically provide the following services:

- Perform care planning assessments to identify problems and the need for care services.
- Screen, arrange for, or monitor home care or other services, and provide crisis intervention (e.g., advocacy services, assisting with discharge planning, etc.).
- Review financial, legal or medical issues and offer referrals to geriatric specialists.
- Offer short-term or ongoing assistance for long-distance caregivers by coordinating care and keeping caregivers informed of an individual's condition and status.
- Research and explain community options such as homemakers, companions, day care, assisted living and nursing homes.
- Work with elder law attorneys and financial planners regarding Medicare/Medicaid benefits, care facility admission requirements and other financial obligations and resources.
- Ensure that your loved one receives all possible aid from the government and private programs.
- Analyze in-home medical equipment needs and contact providers.
- Coordinate the move to your home or to a care facility.
- Help arrange respite care—temporary care that can be provided inside or outside the home that provides a break for caregivers.
- Counsel, support and educate you, your loved one and other family members on caregiving needs and changes.
- Conduct or find support groups that relieve stress and promote understanding within families.
- Advocate for your loved one's rights and safety.

PCMs usually work independently. Cost varies, but typically there is an initial assessment fee (ranging from \$300 to \$600 or more) plus an hourly rate for services (ranging from \$85 to \$200 an hour), which does not include the cost of any recommended resources/services. Keep in mind that while insurance may cover some services (home care, skilled care, etc.), fees for PCMs are not usually covered by insurance (although some long-term care insurance policies may cover them).

Since PCMs are not regulated, it is important to evaluate their experience and credentials. Most PCMs have expertise in the health care and social services systems and a minimum of a bachelor's degree; most also have a master's degree in a related field (e.g. public health, social work, etc.). In general, they should be state-licensed in their profession (e.g., social work, nursing) and have plenty of hands-on experience. Question them about their case load; if they have too many clients, they may not be able to give your loved one adequate attention. For a detailed evaluation checklist, please refer to the guide *Evaluating a Professional Care Manager*.

Case Managers

Case managers are usually affiliated with a hospital, nursing home or other health-care related organization (such as the Area Agency on Aging or an insurance company) and their main role is typically to help find appropriate services as offered by their organization. This often means helping determine eligibility for entitlement programs. For example, a case manager may be assigned to find Medicaid-covered services for a Medicaid recipient. Since these services are typically provided free or at low-cost by non-profit agencies, you may not have the option of screening, interviewing or selecting a case manager, rather one will probably be assigned to you. If, however, you are dissatisfied, ask to be assigned someone else. In some areas of the country, you may be able to hire a case manager on your own (much like a PCM) but this is not as common.

Getting Organized

One of the most important aspects of long-distance caregiving is getting and staying organized. Keep an ongoing log of your loved one's needs and document important information. Many caregivers find that it helps to keep a notebook of important names, addresses, phone numbers as well as your loved one's specific care needs. Consider organizing it into the following sections:

- Doctors
- Community Resources
- Caregivers
- Travel Information
- Hospitals
- Miscellaneous Information
- Medications
- Special Needs
- Financial and Legal

By keeping this information all in one place, you will have everything at your fingertips. Please refer to the guide *Health Care, Legal and Financial Issues for Caregivers* for a record-keeper, which will help you organize and document your loved one's personal, legal and financial information. Additionally, the guide *Adult Care Organizer for Caregivers* can help you organize your loved one's personal and medical data so this information is readily accessible in the event of an emergency.

Relocating Your Loved One

Rather than manage care from a distance, some caregivers opt to relocate their loved one to their own home or a local alternative living arrangement. Be sure to check with your loved one's doctor about the feasibility of relocating him or her. If this is an option for you, remember, relocating a loved one can bring many challenges. You and your loved one will have to consider living arrangements, new community resources and other medical, legal and financial issues. Keep in mind that it may be difficult for your loved one to leave behind his or her support

system of friends, family, neighbors and social, recreational or religious activities. To ensure a smooth transition, communicate openly and honestly with your loved one, involve him or her in the decision process and take the following issues into consideration.

Housing Arrangements

When looking at different housing options, your loved one's living arrangements may be largely determined by the availability of resources and whether personal care assistance is required. If you are considering living with your loved one, you'll want to present the idea to your family. For more information, please refer to the guide *What You Need to Know About Becoming a Caregiver*. If living together is not a viable option, consider residential care facilities as early as possible. For more information, please refer to other guides in the series.

Community Concerns

Regardless of whether your loved one lives with you or not, there are some basic concerns about any new environment that need to be addressed. You need to consider the safety of the area and its accessibility to grocery stores, doctors, caregivers, religious centers and other services. You should also investigate the social and recreational options for your loved one. Every community provides different opportunities and services to its senior residents. Determine whether the services in the new community can meet your loved one's needs.

Medical Considerations

To prepare for emergencies, locate new physicians, dentists, pharmacies and medical centers as soon as possible. Ask neighbors and co-workers for recommendations. You can also call the local hospital to find a physician referral service. Carefully evaluate your loved one's health insurance policies and, if necessary, purchase new ones. Contact the appropriate insurance departments and find out if moving will affect any supplemental health insurance or long-term care policies.

Legal Issues

Because state laws vary, it's important to make sure that legal documents are in accordance with the laws of the new state. Wills, living wills, trusts, powers of attorney and guardian/conservatorship documents may have to be changed to satisfy different regulations. Have an attorney review the various documents and make sure they comply with state laws. Most communities have legal services that can refer you to an attorney. For more information, please refer to the guides *Health Care, Legal and Financial Issues for Caregivers* and *Finding a Lawyer That Is Right for You*

Financial Factors

When you relocate your loved one, you may have to transfer bank accounts, redirect assets and investments or sell property. To continue receiving Social Security, Medicare, pensions and other benefits and income, you must submit the proper forms to change your loved one's address. Recipients of Supplemental Security Income (SSI) benefits, in particular, should find out if their move will affect their eligibility. Also, Medicaid recipients will need to determine what the new state guidelines are and whether benefits will transfer from state to state.

Note—If your loved one lives overseas, additional considerations and arrangements will need to be made. Check with the American Embassy for details about relocating a loved one from another country.

Relocating Yourself to Care for a Loved One

In some cases, caregivers choose to move closer to their loved one. If this is an option for you, think carefully about how it will affect you (and your family). In addition to the considerations on the previous pages ask yourself the following questions:

- Can you afford to move?
- How would the move affect other family members?
- What are the financial/tax ramifications of the move?
- Will you be able to find employment?
- Would you want to live in your loved one's home? Have you discussed this with your loved one?
- Would you prefer to live on your own in the area? Will you be able to find a place to live?
- Will you be able to share the caregiving with other family and friends?

These questions should serve as a guideline only. Relocating can involve many factors, including finding a new home, job, doctors, hospitals, schools, etc. Carefully weigh all of your options before making a decision.

Helpful Resources

National Alliance for Caregiving
4720 Montgomery Lane, Suite 642
Bethesda, MD 20814
301-718-8444
www.caregiving.org

This organization is a national resource center providing information on caregiving issues, elder-care conferences, publications and training for family and professional caregivers.

National Association of Professional Geriatric Care Managers
1604 N. Country Club Road
Tucson, AZ 85716
520-881-8008
www.caremanager.org

This organization can provide referrals to professional care managers nationwide who are members of this association.

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