



Home Care Planning Toolkit: A Step-by-Step Family Guide

For Organized Families Who Want to
Prepare Early

Start Planning Before a Crisis Happens



The best home care experiences begin with preparation—not panic. This guide is designed for families who want to be proactive, ask the right questions, and build a thoughtful plan before the need for care becomes urgent

. Whether you're supporting a parent, spouse, or yourself, Caresify's Circle of Care™ is here to guide you every step of the way.

Step 1: Identify Needs, Funding, and Scheduling

- ✓ Activities of Daily Living (ADLs): bathing, dressing, toileting, eating
- ✓ Instrumental ADLs: cooking, cleaning, managing medications
- ✓ Emotional support: companionship, memory care, grief counseling
- ✓ Technology: monitoring (Caresify360™), medication reminders, video check-ins
- ✓ Budget planning: Medicaid/waiver eligibility, private pay, insurance
- ✓ Family availability: who can help and when
- ✓ Preferred hours: hourly, daily, overnight, or live-in



Step 2: Questions to Ask During Consultations

- What types of caregivers do you offer (HHA, CNA, RN)?
- Are your caregivers trained in dementia or fall prevention?
- How does your agency handle emergencies?
- What if our regular caregiver is unavailable?
- Do you have bundled services like CAP or transitional care?
- How do you ensure communication between caregivers and families?
- What technologies are included (**Caresify360™**, tablets, monitoring)?



Step 3: Sample Care Plan with Caresify Circle of Care™

Client: Ms. B, Age 82, Lives Alone

Needs: Fall risk, early-stage dementia, daughter lives 2 hours away

Customized Plan:

- CAP: 40-hour AfterCare following recent hospital discharge
- SAFE Steps™: Daily fall prevention checklist and caregiver-led exercises
- CDSP™: Dementia support program with caregiver routine
- CARE Activ™: Gardening and music sessions twice weekly
- Caresify360™: Medication reminders and daily vitals tracking via tablet



Step 4: Transition Smoothly Without Disrupting Routine

Moving into home care should feel like support—not disruption. Here's how to ease into it:

- Start small with a trial day or weekly visit
- Introduce caregivers as companions, not replacements
- Schedule care during quiet times to avoid overwhelm
- Use Caresify's onboarding and care journaling tools to track progress and comfort
- Reassure your loved one that care is meant to keep them at home—not take them away from it



BOOK NOW



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Partner with Caresify to Plan Ahead

Proactive families make the best care decisions. Let Caresify help you build a customized, compassionate, and cost-effective plan tailored to your unique needs.

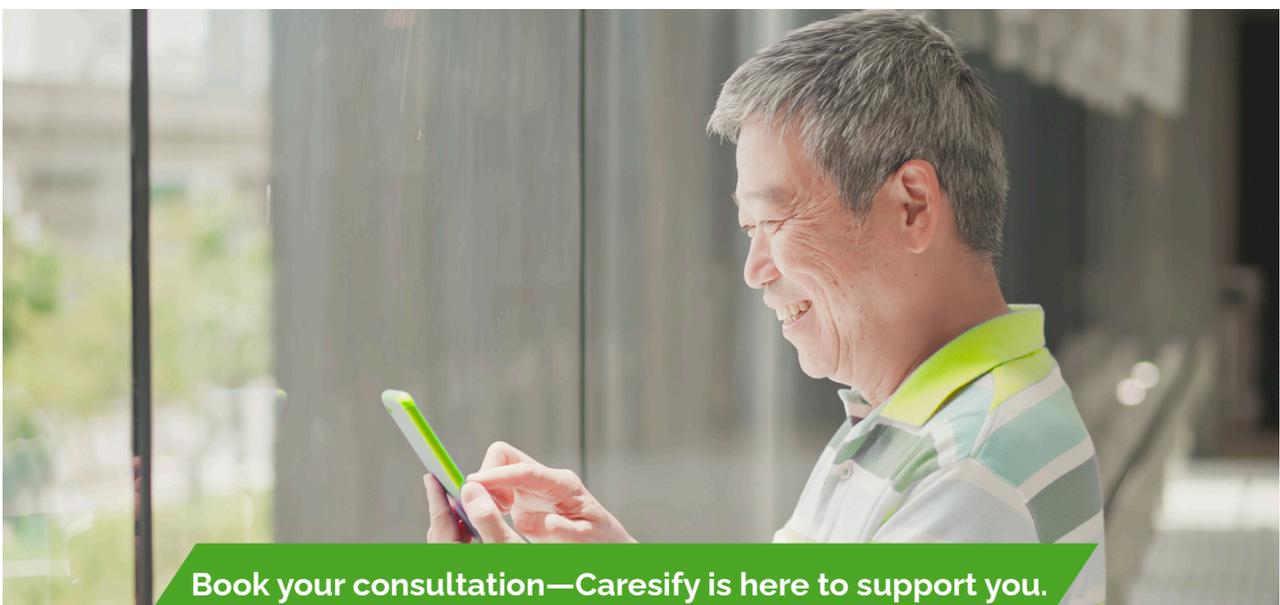
Download more of our Family Guides or call today
for a free care planning consultation.



(888) 799-5007



www.caresify.com



Book your consultation—Caresify is here to support you.