

GENERAL NEEDS ASSESSMENT AND CARE PLAN



Managed Senior Care, LLC
Informed Decision-Making.

Client	
Created	
Last Updated	

Area of Need	Associated Tasks	Point Person	Plan
Home Maintenance & Living Situation	Pay rent or mortgage		
	Repairs		
	Ongoing maintenance		
	Yard work		
	Snow removal		
	Safety modifications		
	Pet Care		
	Grocery Shopping		
	Meal Preparation		
	Housekeeping		
	Packing		
	Selling		
Notes:			

Transportation Needs	Driving decision		
	Arranging transportation		
	Locating services		
Notes:			

Personal Care	Organizing care providers		
	Provide personal care		
	Rides to hair stylist/ barber		
	Clothing		
Notes:			

Health Care	Understand medical condition		
	Make Appointments		
	Drive/ Accompany to appointments		
	Handle insurance billing		
	Medication management (refill prescriptions, pill box)		
	Perform medical tasks		
	Order/ traing on adaptive devices		
Notes:			

Communication	Keeping everyone informed		
	Daily check in		

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	Notes:		

Socialization	Arranging for outings		
	Arranging for visitors		
	Sending thank you cards (as needed)		
	Holiday planning		
	Notes:		

Financial Affairs	Paying Bills		
	Managing Assets		
	Keeping financial records		
	Managing public benefits		
	Notes:		

Authorized Receivers of this Document			
Name	email	Preferred phone number	Mailing address

Approved By	
Date	Name