

Creating a Care Plan: BEFORE THE CONVERSATION



GET INFORMATION

The first step in creating a care plan is understanding the current and future needs of your loved ones. This can start by talking and asking questions. In preparing for a life-planning conversation with your loved one about their wishes or your own, you may find it useful to have certain information on hand. Here are some details you might want to collect through personal observations, input from other people, or even a bit of research.

As you review each of these considerations, consider making notes about specific concerns.

Explore the Situation

Are you or your loved one:

- Facing a medical condition? _____
- Worried about safety? _____
- Stressed by finances or bills? _____
- Needing clarity on legal issues or representatives? _____
- Looking to update documents? _____
- Experiencing a milestone? _____
- Other: _____

Are you or your loved one facing a medical condition?

If so, what is it?

How may this impact your immediate circumstances?

How may this impact the future?

Explore Your Support System

Think about where you might find insight, support or resources.

- Friends and family: _____
- Advocacy organizations: _____
- Support groups: _____
- Social services: _____
- Mediation services: _____
- Medical or legal professionals: _____
- Other: _____

Remember: As a benefits-eligible University of Arizona employee, you can [meet one-on-one](#) with a dependent care specialist at Life & Work Connections. They can help you identify the information and services that are most important to you and assist you in navigating those options.

Explore the Terminology

Language around life planning and advance directives can be confusing. Consider looking into the terms below, which might help make the discussion less stressful.

Health Care and End-of-Life Planning	Legal and Estate Planning	Caregiving
<ul style="list-style-type: none">• Health care agent (a.k.a. health care proxy or health care representative)• Living will• Medical power of attorney• Surrogate	<ul style="list-style-type: none">• Conservatorship• Guardianship• Executor• Probate• Trust• Will	<ul style="list-style-type: none">• Activities of daily living• Family and Medical Leave Act (FMLA)• Informed consent• Respite care



DEFINE PRIORITIES

Now that you have gathered some information, it's time to determine your priorities.

1. Rank your specific concerns from most important to least important.

2. Rank your specific concerns from most urgent to least urgent. This may not align with the ranking of importance. That's okay.

3. Based on the importance and the urgency of the concerns, what do you need to address first with your loved one?
