Checklist for Selecting and Working with A Geriatric Care Manager

This is a three-part form. Use Part I to help decide how you might use the services of a geriatric care manager (GCM). Use Part II as a guide in choosing a qualified GCM. Use Part III to help you work effectively with the GCM you select.

Part I: Do We Need a Geriatric Care Manager?

Do you or does your loved one need . . .

- ❑ A professional needs assessment on:
  - ❑ Medical issues or health concerns.
  - ❑ Psychological, emotional, or mental health needs.
  - ❑ Housing, personal care, or quality-of-life issues.
- ❑ Support in finding, arranging, and monitoring support services:
  - ❑ Meals and nutrition.
  - ❑ Transportation.
  - ❑ Help with activities of daily living.
  - ❑ Bill paying and similar tasks.
  - ❑ In-home health care.
  - ❑ Other support for independent living.
- ❑ An "on the scene" surrogate for family living at a distance.
- ❑ Someone to help with family communications, meetings.

Notes

Resource no. SRL-FCL015 Copyright © 2010, IlluminAge Resource Libraries, www.illuminAge.com. Provided online for personal use only. All other rights reserved.

- ❑ An advocate in dealings with the health care system, insurance plans, etc.
- ❑ Other: _____

Part II: Selecting a Geriatric Care Manager

In most states, geriatric care managers are not licensed or regulated. So, it pays to do your homework before making your selection.

- ❑ What are the person's qualifications, education and experience?
- ❑ Ask for three or more references. Then, follow up by giving them a call. (Note: for confidentiality reasons, a GCM will probably not be able to give you the names of other clients or families served. Instead, expect to see as references physicians, lawyers who serve mostly older clients, and other similar professionals.)
- ❑ How long has this person been providing GCM services?
- ❑ Does this person know the local senior services scene?
- ❑ How does this person charge for services? Is this a service you can budget for? Who will be paying for these services?
- ❑ Is this person affiliated with a particular organization or service provider? If so, can he/she be impartial in making recommendations?
- ❑ Will this person make good communications a priority? How will you exchange information? By meeting in person? By phone? By e-mail?

Notes

Part III: Getting the Most Out of Your Relationship

Here are some easy ways to get the most out of your relationship:

- ❑ Arrange for regular updates; when you receive new information, deal with it promptly.
- ❑ Give regular feedback to your GCM on how well the arrangement seems to be working; ask for his/her feedback, too.
- ❑ Ask yourself from time to time whether there is an expanded role your GCM could be playing, or whether there are areas in which you or your loved one no longer needs help.

Notes