

## JUST-IN-TIME PLANNING GUIDE

This planning guide provides an outline of basic information that will help you stay organized while supporting your parents through the many steps of managing chronic or acute health problems. You can complete one guide for each parent and another guide for yourself!

Print more than one copy so you can update the information as necessary.

Or, you can make a digital file which will be easier to update. Use the following headings:

Personal information

Location of documents

Important contacts

- Emergency
- Medical
- Healthcare
- Financial
- Legal
- Spiritual

If you are the guardian for your mom or dad, you will need to keep track of more information, including appointments, medications, and care plans.

Check out the review of 4 Handy Apps for your Doctor Appointments, found on NextAvenue

<https://www.nextavenue.org/4-handy-apps-your-doctor-appointments/>

It is becoming more common to find medical and health records online.

For example, in Alberta you can register at <https://myhealth.alberta.ca>

## ***Communicating with the health care providers***

*Older adults are often involved with a variety of programs and professionals including home care services, medical clinics, and hospitals. The healthcare system can be confusing because so many services and providers are involved.*

*The healthcare system is large and complex. You will meet many providers and they will not always communicate with each other. You may have to tell your story over and over. This takes energy and perseverance. Keep notes of the most important information to hand to a health professional that you are meeting for the first time.*

*Keep track of names and contact information: when you need to return a call, it will be very helpful to have the name and phone number.*

*Have patience! Sometimes you may be given incomplete information. Sometimes you may get frustrated having to make numerous phone calls to connect with the right provider.*

Other articles that you might find helpful are available on our website.

Your Aging Parents <https://youragingparents.ca/articles>

**Say it Again Please: Medical Jargon**

**Who's Who on the Health Care Team**

**Tips for Interacting with Health Care Providers**

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Source: Maureen Osis, Judy Worrell, & Dianne McDermid. *Your Aging Parents: How to Prepare. How to Cope.* 2<sup>nd</sup> ed. 2010. ElderWise Publishing. [youragingparents.ca](https://youragingparents.ca)

Questions? Contact us: [info@youragingparents.ca](mailto:info@youragingparents.ca)

*Your Aging Parents. Osis, Worrell, & McDermid*

## PERSONAL INFORMATION

Healthcare insurance \_\_\_\_\_

## LOCATION OF DOCUMENTS

Bank Accounts \_\_\_\_\_

Safety Deposit Box (and the key) \_\_\_\_\_

House Insurance \_\_\_\_\_

Life Insurance \_\_\_\_\_

Other Insurance (car, property) \_\_\_\_\_

Investments and RRSPs \_\_\_\_\_

Pension information \_\_\_\_\_

Will \_\_\_\_\_

Power of Attorney \_\_\_\_\_

Healthcare Directive \_\_\_\_\_

Pre-planned funeral information \_\_\_\_\_

# IMPORTANT CONTACTS

## *Emergency Contact*

Name: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Tel: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

## *Emergency Contact*

Name: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Tel: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

## *Emergency Contact*

Name: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Tel: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

***Medical Contacts***

***Family Physician***

*Name:* \_\_\_\_\_

*Mailing Address:* \_\_\_\_\_

\_\_\_\_\_

*Tel:* \_\_\_\_\_ *Fax:* \_\_\_\_\_

*E-mail:* \_\_\_\_\_

***Specialist***

*Name & Specialty:* \_\_\_\_\_

*Mailing Address:* \_\_\_\_\_

\_\_\_\_\_

*Tel:* \_\_\_\_\_ *Fax:* \_\_\_\_\_

*E-mail:* \_\_\_\_\_

***Specialist***

*Name & Specialty:* \_\_\_\_\_

*Mailing Address:* \_\_\_\_\_

\_\_\_\_\_

*Tel:* \_\_\_\_\_ *Fax:* \_\_\_\_\_

*E-mail:* \_\_\_\_\_

**Healthcare Contacts**

**Home/Community Care Coordinator**

Name: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

\_\_\_\_\_

Tel: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

**Pharmacist**

Name: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

\_\_\_\_\_

Tel: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

**Geriatric Care Manager**

Name: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

\_\_\_\_\_

Tel: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

***Other Healthcare Contacts***

***Name:*** \_\_\_\_\_  
*Role/Position*

*Mailing Address:* \_\_\_\_\_  
\_\_\_\_\_

*Tel:* \_\_\_\_\_ *Fax:* \_\_\_\_\_

*E-mail:* \_\_\_\_\_

***Name:*** \_\_\_\_\_  
*Role/Position*

*Mailing Address:* \_\_\_\_\_  
\_\_\_\_\_

*Tel:* \_\_\_\_\_ *Fax:* \_\_\_\_\_

*E-mail:* \_\_\_\_\_

***Name:*** \_\_\_\_\_  
*Role/Position*

*Mailing Address:* \_\_\_\_\_  
\_\_\_\_\_

*Tel:* \_\_\_\_\_ *Fax:* \_\_\_\_\_

*E-mail:* \_\_\_\_\_

***Financial Contacts***

*Bank* \_\_\_\_\_

*Address:* \_\_\_\_\_

*Tel:* \_\_\_\_\_ *Fax:* \_\_\_\_\_

*General Contact* \_\_\_\_\_

***Personal Banker*** \_\_\_\_\_

***Accountant/Income Tax***

*Name:* \_\_\_\_\_

*Mailing Address:* \_\_\_\_\_

*Tel:* \_\_\_\_\_ *Fax:* \_\_\_\_\_

*E-mail:* \_\_\_\_\_

***Financial Advisor***

*Name:* \_\_\_\_\_

*Mailing Address:* \_\_\_\_\_

*Tel:* \_\_\_\_\_ *Fax:* \_\_\_\_\_

*E-mail:* \_\_\_\_\_



***Legal Contacts***

***Lawyer***

Name: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

\_\_\_\_\_

Tel: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

***Spiritual Contacts***

***Pastor, Priest, Minister, Rabbi, Spiritual counsellor***

Name: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

\_\_\_\_\_

Tel: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_