

A Guide To Help You Plan For Successful Aging (To be Completed by a Couple)

*Developed by Mercy Care for the Adirondacks
and Tri-Lakes Aging in Place Task Forces
February 2013*

NAMES: _____ (Partner 1–“P1”)

_____ (Partner 2–“P2”)

Prepared _____
(Date)

Introduction

This *Guide to Successful Aging* is meant as a flexible tool which may help you and your partner plan for your own successful aging. Adapt it and use it as you see fit.

As we age, we cannot know what will be our health conditions and our abilities in the years ahead and those of others who are important to us. The likelihood of being able to age successfully, however, is greatly increased for most older women and men through the development of plans for living arrangements, relationships with others, and activities that will enable them to enjoy a fullness of life for as long as possible. You may avoid, perhaps under crisis conditions, having to suddenly consider for the first time what to do.

Our Personal Plan to Age in Place Successfully (To be reviewed annually in January of each year)

Outlined below are our personal plans for how we want to age successfully—to stay healthy, active, and fully participating in my community for as long as possible. By preparing this plan, we are considering/developing our proactive approach to *age in place*.

Our primary contacts (family member, friend, attorney, etc. who should know about, participate in, and be guided by my Aging in Place Plan):

Name:

Relationship (spouse, son, daughter, friend, etc.):

Address:

Telephone number:

e-mail address:

(Other personal contacts and their information are included at the end of this Plan.)

Note: Agencies mentioned throughout the Guide are described more fully at the end of this document.

1. We will stay socially engaged and connected to our community in the following ways: (Please fill in the circle for as many answers as apply)

P1:

- Volunteering—helping others
- Being part of a faith community
- Serving on a board
- Visiting the library
- Attending school functions
- Joining an exercise group
- Taking courses at North Country Community College or Paul Smith's College
- Attending community events
- Visiting my local Adult Center regularly
- Requesting a Mercy Care for the Adirondacks Friendship Volunteer to help me stay connected to my community
- Other _____

P2:

- Volunteering—helping others
- Being part of a faith community
- Serving on a board
- Visiting the library
- Attending school functions
- Joining an exercise group

- Taking courses at North Country Community College or Paul Smith's College
- Attending community events
- Visiting my local Adult Center regularly
- Requesting a Mercy Care for the Adirondacks Friendship Volunteer to help me stay connected to my community
- Other _____

Together we will:

- Volunteer—help others
- Be part of a faith community
- Serve on a board
- Visit the library
- Attend school functions
- Join an exercise group
- Take courses at North Country Community College or Paul Smith's College
- Attend community events
- Visit our local Adult Center regularly
- Request a Mercy Care for the Adirondacks Friendship Volunteer to help us stay connected to our community
- Other _____

2. To practice active aging, I will (Please fill in the circle for as many of the following answers as apply):

P1:

- Go to the gym regularly
- Walk at least 20 minutes 3 - 5 times per week
- Swim 2 - 3 times per week
- Play golf or tennis 2 - 3 times per week
- Kayak or canoe 1 - 2 times per week
- Cross country ski 1 - 2 times per week
- Bicycle 2 - 3 times per week
- Modify my exercise activity to accommodate aging
- Consult with my doctor for alternatives when exercise becomes difficult
- Remain actively engaged in my community
- Learn about recreational and wellness opportunities at my local Adult Center

- Other _____

P2:

- Go to the gym regularly
- Walk at least 20 minutes 3 - 5 times per week
- Swim 2 - 3 times per week
- Play golf or tennis 2 - 3 times per week
- Kayak or canoe 1 - 2 times per week
- Cross country ski 1 - 2 times per week
- Bicycle 2 - 3 times per week
- Modify my exercise activity to accommodate aging
- Consult with my doctor for alternatives when exercise becomes difficult
- Remain actively engaged in my community
- Learn about recreational and wellness opportunities at my local Adult Center
- Other _____

Together we will:

- Go to the gym regularly
- Walk at least 20 minutes 3 - 5 times per week
- Swim 2 - 3 times per week
- Play golf or tennis 2 - 3 times per week
- Kayak or canoe 1 - 2 times per week
- Cross country ski 1 - 2 times per week
- Bicycle 2 - 3 times per week
- Modify our exercise activity to accommodate aging
- Consult with our doctors for alternatives when exercise becomes difficult
- Remain actively engaged in our community
- Learn about recreational and wellness opportunities at our local Adult Center
- Other _____

3. If we feel lonely or isolated, we will (please fill in as many circles as apply):

- Call a family member
- Call a friend
- Contact Mercy Care for the Adirondacks to request a Friendship Volunteer
- Engage with our faith community
- Join an organization
- Other _____

4. If we are in need of spiritual care, health education about a medical condition, or a loss we have experienced, we will (please fill in as many circles as apply):

- Reach out to a family member or friend
- Talk with our pastor
- Talk with our physicians
- Contact Mercy Care for the Adirondacks to request a Volunteer Parish Nurse
- Contact High Peaks Hospice & Palliative Care*
- Pray together or by ourselves
- Other _____

**** Organizations and agencies referred to in this plan are listed with a description and contact information at the end of this plan***

5. If we need health and human services to help us stay in our home for as long as we are able, we will contact (please fill in as many circles as apply):

- County Office for the Aging—NY CONNECTS
- Our physicians
- A private home health organization such as North Country Home Services
- High Peaks Hospice & Palliative Care
- County Social Services Department
- Other _____

6. If our home needs modifications or repairs for us to continue living there comfortably as we age, we will (please fill in as many circles as apply):

- Contact the Tri-Lakes Center for Independent Living for a free home accessibility assessment
- Try to find a “Certified Aging in Place” contractor to make modifications to our home
- Contact the Center for Inclusive Design and Environmental Access at University of Buffalo which provides home modification and consulting services for families and individuals
- Contact our local County Office for the Aging
- Contact the Adirondack Community Housing Trust
- Other _____

7. If home repairs, property taxes, or home modification expenses exceed our income, we will (please fill in as many circles as apply):

- Learn about reverse mortgages and consider securing one
- Take money from our savings, 401(k), or other retirements funds
- Consult with our local Housing Assistance Agency to learn what options and assistance might be available to us
- Consult with Adirondack Community Housing Trust to see what assistance might be available to us
- Consult with our children or other family
- Consider selling or renting out our home
- Move to a less expensive residence of our choice
- Other _____

8. If both of us are no longer able to drive, we will (please fill in as many circles as apply):

- Rely on another person living in our home to drive us
- Call on a friend or family member to drive us
- Call Mercy Care for the Adirondacks to request a volunteer to drive us
- Call our church for assistance
- Call the Office for the Aging for assistance
- Ride the County bus, if we are able
- Call a taxi
- Other _____

9. If we are no longer able to get out to get our groceries, prescription drugs, and other necessities, we will (please fill in as many circles as apply):

- Rely on family or friends
- Hire someone to do our shopping for us
- Call Mercy Care for the Adirondacks to request a Friendship Volunteer to accompany us to do our shopping
- Call Mercy Care for the Adirondacks to do our shopping for us
- Other _____

10. If we are no longer able to prepare our own meals, we will (please fill in as many circles as apply):

- Arrange to have “meals on wheels” delivered to our home
- Order and have delivered food from a restaurant
- Rely on friends or family
- Attend a nutrition site in our community at our local Adult Center
- Other _____

11. At such time as we may not be able to have all of our needs adequately met living by ourselves in our own home, we are planning to:

P1:

- Have one of our children, other relative, or friend live with us.
- Live with one of our children, another relative, or friend.
- Have home caregivers as needed come to our home.
- Enter a residence, assisted living or nursing home where our needs for care can be met
- We have not yet developed a plan
- We intend to talk about this with family and/or others and research the options available to us to have home health aides or nursing care provided in our home by calling my County NY CONNECTS Office, County Office for the Aging, or my County Public Health Department.

P2:

- Have one of our children, other relative, or friend live with us.
- Live with one of our children, another relative, or friend.
- Have home caregivers as needed come to our home.
- Enter a residence, assisted living or nursing home where our needs for care can be met
- We have not yet developed a plan
- We intend to talk about this with family and/or others and research the options available to us to have home health aides or nursing care

provided in our home by calling my County NY CONNECTS Office, County Office for the Aging, or my County Public Health Department.

12. If I am no longer able to live in my present home, or choose not to because my spouse is no longer with me, I want to (please fill in as many circles as apply):

- Buy a smaller, more accessible home
- Rent an accessible apartment
- Move to an independent living facility where my meals are provided, my apartment cleaned weekly, and my laundry done for me
- My choice of independent living facility is:
 - 1.
 - 2.
- Move in with family
- Share a home/apartment with a friend(s)
- Leave the area to seek more available options
- Other _____

13. We have completed or reviewed the following documents and considered the following actions to ensure that our wishes are carried out (please fill in as many circles as apply):

P1:

- Health care proxy
- Living will
- Power of Attorney
- Consulted an attorney and written my will
- Reviewed my primary and contingent beneficiary information on my insurance policies and retirement accounts
- After consulting an attorney, considered adding someone I trust to my bank account to pay my bills if I am too ill to do so
- After consulting an attorney, considered giving access to my safety deposit box and bank accounts to someone I trust
- Prepared a catalogue of my bank accounts, credit cards, location of safety deposit box, insurance policies, retirement accounts, pension plans, etc.

P2:

- Health care proxy
- Living will
- Power of Attorney
- Consulted an attorney and written my will

- Reviewed my primary and contingent beneficiary information on my insurance policies and retirement accounts
- If together my spouse and I are too ill or demented to manage our financial affairs, and after consulting an attorney, considered adding someone I trust to my bank account to pay my bills
- If together my spouse and I are too ill or demented to manage our affairs, and after consulting an attorney, considered giving access to my safety deposit box and bank accounts to someone I trust
- Prepared a catalogue of our bank accounts, credit cards, location of safety deposit box, insurance policies, retirement accounts, pension plans, etc.

14. To carry out our personal aging in place plan, as our needs evolve and change, we will connect with the following individuals, agencies or resources to help us execute it. (Please fill in as many circles as apply.)

- Our family members
- Our physicians
- Our faith community
- The local County Office for the Aging—NY CONNECTS
- Our friends
- Mercy Care for the Adirondacks
- High Peaks Hospice & Palliative Care
- Our attorney and/or financial advisor

- Other _____

Contact information for Individuals, Organizations, and Agencies referred to in my plan:

P1:

My Physician:

Name

Address

Phone

My Financial Advisor:

Name

Address

Phone

My Attorney:

Name

Address

Phone

My Pastor:

Name

Address

Phone

Other Family Members or Friends to whom I am sending a copy of my Aging in Place Plan:

Name:

Address:

Phone:

E-mail:

Name:

Address:

Phone:

E-mail:

P2:

My Physician:

Name

Address

Phone

My Financial Advisor:

Name

Address

Phone

My Attorney:

Name

Address

Phone

My Pastor:

Name

Address

Phone

Other Family Members or Friends to whom I am sending a copy of my Aging in Place Plan:

Name:

Address:

Phone:

E-mail:

Name:

Address:

Phone:

E-mail:

Organizations & Agencies Referred to in this Plan:

(If you would like to discuss the organizations listed below, please feel free to call Mercy Care for the Adirondacks for more information.)

Mercy Care for the Adirondacks

An organization serving Tri-Lakes communities sponsored by the Sisters of Mercy; provides Friendship Volunteer, Parish Nurse, and Education and Advocacy Programs to enhance the fullness of life of elders living in their own homes

185 Old Military Road
Lake Placid, NY 12946
518-523-5580
website: www.adkmercy.org
e-mail: dbeal@adkmercy.org

Essex County NY CONNECTS

A program available in Essex County to assist individuals with accessing long term care services; supports the consumer's choice and independence, while also ensuring that they are accessing the most cost-effective service that can be provided.

Based out of the Essex County Office for the Aging
Elizabethtown, NY 12932
518-873-3815

Essex County Office for the Aging
132 Water Street—PO Box 217
Elizabethtown, NY 12932
518-873-3695
1-877-464-1637 (toll free)
Website: www.co.essex.ny.us/ofa.asp

Provides information and assistance to older adults through a variety of programs

Franklin County NY CONNECTS (C.A.R.E.S Unit)

Provides information on long term care services; screens, accepts, and makes referrals for services; provides follow-up and coordination of services

355 West Main Street (mailing address)
125 Catherine Street (located at)
Malone, NY 12953
518-481-1660
1-877-410-5753 (toll free)

Franklin County Office for the Aging:

Promotes independence and dignity for all people age 60 and over, providing information and assistance, and a variety of related support services as needed.

355 West Main Street, Suite 447 (mailing address)
125 Catherine Street (located at)
Malone, NY 12953-1826
518-481-1526

Essex County Public Health Department

Essex County Public Health Department has a certified home health care program to help people help themselves to health and wellness. Working together with a patient's physician, the Essex County Public Health Department provides direct care and stresses preventive health care. They teach patients to care for themselves; to help avoid future illness or cope with long term illness.

Based on individual needs, the following services are available:

- Nurses
- Physical Therapists
- Speech Therapists
- Occupation Therapists
- Registered Dietician
- Home Health Aides

Payment for home care services are accepted from various sources, such as:

- Medicare

- Medicaid
- Veterans
- Blue Cross/Blue Shield
- Worker's Compensation
- Liability
- Major Medical
- NYS Empire
- Other insurance carriers
- Self Pay

132 Water Street—PO box 217
 Elizabethtown, NY 12932
 518-873-3500

Franklin County Public Health Department

The Franklin County Public Health Department houses various community health and clinical care service programs that serve the residents of Franklin County. Clinical programs include a Certified Home Health Agency (CHHA) and a Long-Term Home Health Care Program (LTHHCP). The CHHA and the LTHHCP provide skilled nursing, Physical Therapy, Occupational Therapy, Speech Therapy, and Social Work Counseling in clients' homes.

125 Catherine Street, Room 101
 Malone, NY 12953
 518-481-1709 (Malone office)
 518-891-4471 (Saranac Lake office)

Essex County Social Services Department

Administers such programs as Medicaid, Home Energy Assistance Program, Temporary Assistance, Food Stamps, Adult Services, etc.

Essex County Department of Social Services

7551 Court Street, PO Box 217
 Elizabethtown, NY 12932

Phone: (518) 873-3441

Franklin County Social Services Department

Administers such programs as Medicaid, Home Energy Assistance Program, Public Assistance, Food Stamps, etc.

Franklin County Department of Social Services
355 West Main Street
Malone, NY
518-483-6785

North Country Home Services

North Country Home Services provides a variety of home health care services to assist individuals in their homes enabling them to remain as independent as possible when undergoing stress and/or hardships due to illness, disability, injury or limitations due to age. Home Health Aides, Personal Care Aides and Chore Companions are available via contract from North Country Home Services or may also be funded by the following programs and payment sources:

- County Departments of Social Services
- County Public Health Nursing Services
- Office for the Aging EISEP Programs
- St. Regis Mohawk OFA
- Hospice Programs
- Veterans Administration Program
- Long Term Care Insurance
- Private Insurance

Office Locations

155 Finney Boulevard Malone, NY 12953
(518) 483-4502

25 Church Street
Saranac Lake, NY 12983
(518) 891-2641

36 High Street Tupper Lake, NY 12986
(518) 359-3336

High Peaks Hospice & Palliative Care

High Peaks Hospice and Palliative Care is a rural, not-for-profit health care corporation, certified and licensed by New York State. Our hospice is composed of a caring team of professionals and volunteers who provide the full range of quality hospice services, primarily in the home, to all terminally ill individuals and their families in portions of Franklin and Hamilton Counties and all of

Warren and Essex Counties. Our health care team provides physical care, emotional support and education to the entire family regardless of age, gender, nationality, race, creed, sexual orientation, disability, diagnosis or ability to pay.

The Tri-Lakes office, located in Saranac Lake, serves southern Franklin, western Essex, and parts of St Lawrence and Hamilton counties.

19 Church Street
Saranac Lake, NY 12983

518-891-0606

Toll Free: 877-324-1686
Fax: 518-891-0657
E-mail: mvannortwick@hphpc.org

Tri-Lakes Center for Independent Living

The Tri-Lakes Center for Independent Living serves people with disabilities and their families.

43 Broadway, Suite 1
Saranac lake, NY 12983
518-891-5295
518-891-5293 TTY)

Center for Inclusive Design and Environmental Access at University of Buffalo

The IDeA Center provides design and consulting services for families and individuals, social service agencies, and not-for-profit organizations. Over 250 projects have been completed including workplace modifications, home modifications, home designs, renovation designs for group homes and a building signage system.

378 Hayes Hall
School of Architecture and Planning
3435 Main Street
University at Buffalo
Buffalo, NY 14214-3087

Adirondack Community Housing Trust

Adirondack Community Housing Trust utilizes the Community Land Trust (CLT) model for perpetually affordable housing. The first CLT's were developed in the 1970's. There are now some 200 in the country, and the number is growing rapidly as more communities are concerned with preserving affordable homeownership.

For qualified home buyers, ACHT will finance a portion of the mortgage to purchase an affordable house in exchange for title to the land.

103 Hand Avenue
PO Box 157
Elizabethtown, NY 12932
518-873-6888

Housing Assistance Program of Essex County

The Housing Assistance Program of Essex County (HAPEC) is a non-profit organization that exists for the sole purpose of assisting Essex County residents in a variety of ways.

103 Hand Avenue
PO Box 157
Elizabethtown, NY 12932
518-873-3691

My Faith Community

Contact Information: