

# Futures Planning Checklist (Beginner)

## Overview

This checklist will help you start future planning in a practical, person-centered way, without trying to do everything at once. It focuses on the basics that protect safety, continuity, and quality of life during change.

### How to use this checklist

- Start with **Section A** and complete **1–3 items per week**.
- Focus first on continuity (what keeps life stable day-to-day).
- Review at least **once per year** and after major changes (health events, moves, caregiver changes, service changes).

## A) Start Here (First 2–4 weeks)

- ☐ Identify the planning team (2–5 people)
- ☐ Confirm the person's preferred name/pronouns and communication supports
- ☐ Complete the 1-page "About Me" profile
- ☐ Create a contact list (family, supporters, providers, pharmacy)
- ☐ List current supports (unpaid supports + paid services)
- ☐ Choose where key documents will be stored (paper + digital)

**Outcome:** You can describe who the person is, who supports them, and where essential information is located.

**Link:** 1-page About Me Profile

## B) Daily Life and Continuity (Next 30–60 days)

- ☐ Write down "what a good day looks like" (routines, activities, preferences)
- ☐ List daily supports and who provides them (morning, day, evening, overnight)
- ☐ Document communication needs and how to support choices
- ☐ Identify social connections that should be protected (people, places, groups)
- ☐ Identify what changes are hardest and what helps with transitions

**Outcome:** Supporters can maintain routines, dignity, and relationships during change.

## **C) Safety and Emergency Planning (Next 30–60 days)**

- ☐ Create an emergency plan for “what if the main caregiver is unavailable today?”
- ☐ Create a portable summary (health notes, routines, calming supports)
- ☐ Confirm medication list is accurate (dose, schedule, pharmacy)
- ☐ Identify backup transportation options
- ☐ Review home safety needs (falls, choking, wandering, stove safety)
- ☐ Write down early warning signs of stress and what helps

**Outcome:** A trusted supporter could step in safely in a crisis.

## **D) Benefits and Service Stability (Next 60–90 days)**

- ☐ Confirm SSI/SSDI, Medicaid, and waiver status (and current case manager contact)
- ☐ Track renewal and reporting dates (redeterminations, service plan renewals)
- ☐ List providers and service schedules (who, when, what service)
- ☐ Identify gaps in supports (staffing, respite, transportation, behavior supports)
- ☐ Identify waitlists to join (housing, services, therapies)
- ☐ Confirm “backup provider” options if staffing changes

**Outcome:** Benefits and services are less likely to be disrupted during transitions.

## **E) Health and Aging Planning (Next 3–6 months)**

- ☐ Establish a clear care team list (PCP, specialists, dental, behavioral health)
- ☐ Document communication supports for healthcare visits
- ☐ Identify preventive care needs and tracking (sleep, pain cues, falls, constipation)
- ☐ Create a hospitalization plan (what goes to the hospital, who to call, discharge needs)
- ☐ Identify dementia/cognitive change watch points (if relevant) and what to do first

**Outcome:** Health changes are recognized early and handled with a plan.

## **F) Housing and Long-Term Supports (Next 3–12 months)**

- ☐ Clarify the person’s housing goals (where/with whom/what supports)
- ☐ Learn which housing models are realistic locally and what waitlists exist

- ☐ Identify “aging in place” modifications if staying home is the goal
- ☐ Create a transition approach (gradual visits, predictable routines, familiar supports)
- ☐ Document “non-negotiables” (privacy, routines, communication, relationships)

**Outcome:** Housing decisions are planned—not made in a rush.

## **G) Decision-Making and Financial Planning (Next 3–12 months)**

- ☐ Clarify how the person prefers to make decisions and what supports help
- ☐ Explore decision-making options (SDM, POA, HIPAA releases, rep payee)
- ☐ Identify financial planning needs (ABLE, trust planning, estate planning basics)
- ☐ Identify who will hold key roles over time (backups for supporters)
- ☐ Schedule a yearly review meeting and assign owners for next steps

**Outcome:** Decision-making supports and financial planning align with long-term stability.

## **Quick “first week” plan (if you want a simple start)**

**Day 1:** Complete the 1-page profile

**Day 2:** Create a contact list + medication list

**Day 3:** Write down routines and what a good day looks like

**Day 4:** Identify top 3 risks (health, housing, staffing, safety, etc.)

**Day 5:** Choose 3 next steps for the next 30 days