

The experts in aging well.

# Aging Life Care Association® Forms Book

Aging Life Care Association 3275 West Ina Road, Suite 130, Tucson, AZ 85741 p 520.881.8008 | f 520.325.7925 | aginglifecare.org

# **FORMS BOOK**

#### **TABLE OF CONTENTS**

#### **Section 1: Telephone Intake Forms**

- Phone Call Inquiry Form version 1, 2, 3, 4
- Phone Inquiry Follow-up Letter

#### **Section 2: Practice Information Forms**

- Code of Ethics & Standards of Practice
- Client Responsibilities Overview
- Clients' Rights and Responsibilities
- · Statement of Goals
- Mission Statement Template
- Statement of Confidentiality Template

# Section 3: Sample Service Agreements & Releases

- Disclaimer from ALCA Legal Counsel
- Care Management Service Agreement version 1
- Care Management Service Agreement version 2
- Care Management Service Agreement version 3
- Care Management Service Agreement version 4
- Care Management Service Agreement version 5
- Email Consent Template
- Medicaid Service Agreement
- Medicaid Representative Template
- Authorization for Release of Confidential Information
- Sample HIPAA Release Form
- Audio/Visual Release Form

#### **Section 4: Initial Assessment Forms**

- Introduction
- Family Questionnaire version 1
- Family Questionnaire version 2
- Initial Assessment Family Questions
- Aging Life Care Assessment Guidelines
- Assessment Tool
- Assessment: Activities of Daily Living
- Assessment: Emotional Health Supports
- Assessment Form version 1
- Assessment Form version 2
- Assessment Form version 3
- Assessment Form version 4

#### **Section 5: Dementia Assessment Tools & Forms**

- Dementia/Depression Assessment Form
- Depression Assessment Form
- Mental Health Assessment Form

#### **Section 6: Specialized Assessment Tools & Forms**

- Get-up and Go Test
- Barthel Index of Activities of Daily Living
- Instrumental Activities of Daily Living (IADL)
- Fulmer Elder Abuse & Neglect Assessment
- Performance-Oriented Assessment of Gait
- Lawton Instrumental Activities of Daily Living Scale
- Hoarding Questionnaire
- Safety Assessment
- Home Safety Assessment Form
- Urinary Diary Instructions and Tracking Sheet
- Addiction/Alcoholism Test
- CAGE Assessment for Alcohol Abuse
- Safety Risk Scale
- Fall Risk Assessment Form
- Social Assessment
- Sample Caregiver Daily Record
- Care Conference Worksheet
- Discharge Check List
- Hospital Assessment Check List

#### **Section 7: Care Planning Forms**

• Plan of Care Template

# **Section 8: Client Visit Report Forms**

• Client Visit Report Form

#### **Section 9: Completion of Case/Termination Forms**

- Case Closing Summary Template
- Case Closed Form
- Termination Summary Form
- Case Closing Summary Form

#### **Section 10: Employee Forms**

- Incident Form
- Mileage/Expense Log
- Time Sheet Template
- Petty Cash Record Form
- Consult and Communications Log
- Non-solicitation Agreement Form
- Employment Application Form

- Equipment Loan to Employee Form
- Emergency Contact Form
- Emergency Preparedness for Aging Life Care Managers
- Power Outage Precautionary Check Off List
- Facility Evaluation Form
- Psych Therapy Intake Form
- Consent to Services Form

# Appendix: State Specific Forms, Sample Assessments & Tools, Articles and Charts

- Durable Health Care Power Attorney & Health Care Treatment Instructions State of PA
- POLST Assessment State of FL
- Montreal Cognitive Assessment (MOCA)
- VAMC: SLUMS Examination
- Mini Mental State Examination (MMSE)
- Global Deterioration Scale (GDS) Dementia Assessment Form
- Dementia Behavioral Assessment Tool
- Patient Health Questionnaire (PHQ-9) Form
- Pain Assessment in Advanced Dementia Scale (PAINAD) Form
- Bristol Stool Chart
- Determine Your Nutritional Health
- American Geriatric Society Updated Beers Criteria for Potentially Inappropriate Medication Use in Older Adults
- 19 Employment Verification Form
- W4 Employee's Withholding Allowance Certificate
- W9 Request for Taxpayer Identification Number and Certification

# **Disclaimer:**

The Aging Life Care Association offers these materials as sample forms. The inclusion of a sample form in this Forms Book should not be considered an endorsement or recommendation by ALCA. These sample forms are provided "as is" and without any representations or warranties, expressed or implied, including warranties of merchantability, non-infringement of intellectual property, and fitness for any particular purpose. Members should independently assure themselves of the suitability and sufficiency of a sample form for a particular circumstance or transaction. In no event shall ALCA be liable for any damages whatsoever arising out of the use of any sample form.

Revised: July 2024