

Home Care Services Checklist

Arranging home care services for an aging friend or relative can be a confusing process. Many caregivers are not sure what questions to ask to determine if a home care provider is the right one for their situation. The following list of key questions may be useful to consider when arranging home care services and are designed to help you assess and compare providers. These questions are not exhaustive, but will help you in your search. Use a copy of this checklist for each of the home care providers that you are considering.

Name of Home Care Provider _____

Contact Name: _____

Contact Telephone: _____

Address: _____

Website: _____

What are the specific services that are provided?

What are the limitations to services? (What is not provided or included?)

What are the qualifications of the staff?

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What special training does the staff have?

Are caregivers available 24 hours per day, 7 days a week?

Will the same person come regularly? If not, how will I know who will be coming?

What happens if a staff member fails to make a scheduled visit?

Who will supervise the staff or volunteers(s) providing the care?

Does the provider have a supervisor on-call 24 hours a day?

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Is someone available to answer questions or respond to a crisis 24 hours a day?

If so, who is that person and how do I reach them?

What are the costs for services?

Am I eligible for any costs to be covered by the provincial or federal government (e.g., veteran's benefits)?

How does the provider handle billing and payment?

Does the provider ensure patient confidentiality? How?

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Additional Notes:

BMO understands that whether you are new or experienced in the role of caregiver, you have a lot on your shoulders. The responsibilities of looking after a parent, spouse or child can be a significant challenge. For additional checklists and information, please see the resources provided on www.bmo.com/retirementyourway.

You may also be concerned about the financial implications that your role as caregiver may have on your finances over the long-term. Please speak to your BMO investment professional for assistance with the financial implications of caregiving and ensuring that they are considered in your financial plan.

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