The Essential Senior Transition Checklist

What to Do (and When) When a Loved One Needs Help at Home or May Need to Move

Introduction

When a loved one begins to struggle with daily tasks or faces a sudden health change, it can feel overwhelming to know what to do next. This checklist is designed to help you take action—step by step—with clarity and confidence.

Whether you're planning ahead or responding to an urgent need, these key considerations will help you and your family make informed decisions about safety, care, housing, and support.

1. Observe & Identify Needs

- [ ] Are there new safety concerns in the home? (trip hazards, clutter, poor lighting)
- [ ] Are medications being taken consistently and correctly?
- [ ] Is personal hygiene being maintained?
- [ ] Have there been changes in memory, mood, or behavior?
- [ ] Is managing meals, bills, or errands becoming difficult?
- [ ] Are you receiving calls from neighbors or concerned friends?

Tip: Write down your observations. Having clear notes helps with medical visits and family discussions.

2. Have the Conversation

- [ ] Choose a calm, quiet time to talk
- [ ] Use “I” statements: “I’ve noticed…” instead of “You can’t…”
- [ ] Ask about their goals and fears
- [ ] Reassure them they’ll be part of the decision-making
- [ ] Involve other family members only if helpful

3. Plan for Safety at Home

- [ ] Schedule a home safety assessment
- [ ] Install grab bars and improve lighting
- [ ] Clear walkways and remove tripping hazards
- [ ] Consider mobility aids (walkers, ramps, railings)
- [ ] Organize medications and simplify routines
- [ ] Explore local support services (meals, transportation, companions)

A professional aging-in-place consultation can help identify solutions you may not think of on your own.

4. Understand Care Options

- [ ] Research in-home care services in your area
- [ ] Learn the differences between assisted living, memory care, and skilled nursing
- [ ] Know what Medicare/Medicaid covers—and what it doesn’t
- [ ] Talk with a trusted care coordinator or aging expert on what is the right fit for your loved one, and what is available in your area. Maureen can guide you through difficulties and inform you of key facts to consider while navigating this.

5. Prepare for the Future

- [ ] Discuss powers of attorney, healthcare proxies, and living wills
- [ ] Know where important documents are kept (insurance, deeds, advance directives)
- [ ] Talk about long-term housing preferences
- [ ] Consider real estate needs: downsizing, selling, or modifying the home
- [ ] Build a care team and collect contact information for all: family, providers, trusted professionals

Need Support? Let's Talk.

Transitions by Maureen offers professional guidance to help families navigate aging in place for their loved ones, care transitions, and senior housing decisions. All with compassion, clarity, and real-life experience.
Call today: (315) 939-2001

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