

# Geriatric Care Management in the Elder Law Practice

- National Elder Law Foundation (NELF) requires knowledge and proven experience in these areas for Certified Elder Law Attorney (CELA) designation:
  - Estate Planning (wills, trusts)
  - Incapacity Planning (powers of attorney, conservatorship)
  - Health and Personal Care Planning (healthcare directives, living wills, end-of-life matters)
  - Public Benefits (Medicaid, Medicare, Social Security, Veterans)
  - Nursing Home Resident Rights
  - Employment and Retirement Matters
  - Income, Estate and Gift Tax Advice
  - Age Discrimination
  - Housing Counseling
  - Advocacy and Litigation about these issues

# Geriatric Care Management in the Elder Law Practice

## ■ Geriatric Care Manager (GCM)

- Specializes in assisting older persons and their families attain highest quality of life within their circumstances
- Come from variety of backgrounds:
  - Social Work
  - Counseling
  - Nursing
  - Gerontology
  - Case Management

# Geriatric Care Management in the Elder Law Practice

- Professional Geriatric Care Manager (PGCM)
  - Member of National Association of Professional Geriatric Care Managers ([www.caremanager.org](http://www.caremanager.org))
  - Must be Care Manager Certified (CMC) or Certified Case Manager (CCM)
  - Adheres to PGCM Pledge of Ethics and Standards of Practice
    - Loyalty – First duty is loyalty to Client
    - Self-determination – Plans based on Client's decisions
    - Confidentiality – Discloses client information only with client consent or if required for best interest
    - Cooperation – Will cooperate with all other care providers for client's best interest
    - Must identify the Client – others affected by client's care needs considered part of the "client system"

# Geriatric Care Management in the Elder Law Practice

- Services our Geriatric Care Manager performs:
  - Conduct care assessments to identify problems and solutions
  - Identify family conflicts regarding client's care needs and educate family to help resolve
  - Assist families to identify and arrange in-home help and services
  - Coordinate information with medical and healthcare providers
  - Review medical and care issues and make referrals to other professionals
  - Provide support, guidance and advocacy during crisis
  - Help coordinate client's move to another living arrangement
  - Educate client and family about care and other issues
  - Assist with Medicaid application process

# Geriatric Care Management in the Elder Law Practice

## Scenario 1 No Local Family Support

One of three adult children calls attorney to advise that her mother has had health set-back while living independently at home. All children live in other cities. The kids have discussed with mom her need for estate and long-term care planning, and she agrees she needs to engage an elder law attorney to do such planning.

- How can a GCM assist the attorney and client?

# Geriatric Care Management in the Elder Law Practice

## Scenario 1 – The GCM Solution

- The GCM can:
  - Evaluate client's capacity to make decisions, execute legal documents
  - Conduct an assessment of client's ability to return to private home and support services needed to do so
  - Coordinate with client's medical providers about health issues and solutions
  - Inform children (with client consent) of parent's progress or problems on-going

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## Scenario 2 Overwhelmed Caregiver Spouse

Mary, age 70, calls attorney about needing estate planning for her and her husband, Henry. She says she is "stressed to her limits" in caring for Henry at home. He has serious health problems as well as advancing dementia, and Mary is concerned about their financial security and future, since Henry has always handled their financial affairs.

- How can a GCM assist the attorney and client?

# Geriatric Care Management in the Elder Law Practice

## Scenario 2 – The GCM Solution

- The GCM can:
  - Conduct an assessment of client's home and ability to continue caring for spouse there
  - Assess local nursing homes and assist with moving spouse to best setting for his care needs
  - Coordinate with client's medical providers about health issues and solutions
  - Identify medical, financial and caregiver resources to aid client at home and counsel client regarding their use
  - Provide "helping hand" of counsel and support to client
  - Educate client how to be more effective advocate for spouse

# Geriatric Care Management in the Elder Law Practice

## The Life Care Plan Solution

- “Life Care Planning” uses the services of a Geriatric Care Manager to:
  - Identify a client’s legal, financial, medical and health-care needs
  - Develop a plan to meet all those needs
  - Prepare all legal documents and apply for all financial resources to carry out the plan
  - Find and get all available healthcare and related resources necessary to carry out the plan
  - Educate and empower the client and client’s family to achieve the client’s good health, safety and well-being throughout the client’s lifetime

# Geriatric Care Management in the Elder Law Practice

- Links to information about:
  - Geriatric Care Managers
    - [www.caremanager.org](http://www.caremanager.org)
  - Certified Elder Law Attorney
    - [www.nelf.org](http://www.nelf.org)
  - Life Care Planning Law Firms
    - [www.lcplfa.org](http://www.lcplfa.org)