

February 2011

In this issue: Client Survey, Adult Day Care, Tax Considerations for Seniors

What's new at AACM

Watch for our **2011 Client Satisfaction Survey** which we will be emailing to the clients we served in 2009 and 2010. If you receive an email with a link to the survey, we encourage you to take a few minutes to respond. We are always looking for better ways to serve our clients.

Because referrals are the lifeblood of our business, the best way you can thank us, as a satisfied client, is by referring a friend, neighbor or colleague to us! We appreciate all our referrals. In 2010 our top five referrals sources were attorneys, financial planners, personal assistance service providers, friends/family and previous clients.

As a reminder: Because AACM doesn't sell any products or provide nursing, in-home care or medical services, nor do we receive compensation in any way from any of the service providers we recommend, we have no vested interest in steering our clients in one direction or the other. Instead we help a family discern what is right for them. We believe strongly in this business model. This is another reason referrals are so important to us!

AACM is now approved to offer Continuing Education (CE) for Certified Financial Planners (CFP®). If you are involved with a group of financial planners, and you need a speaker to provide CE, let us know. Of course, we still provide CEU for nurses, social workers and case managers. Check our complete list of available presentations on our [website: www.accountableaging.com/aapresentations.cfm](http://www.accountableaging.com/aapresentations.cfm)

Adult Day Care

If you, or someone you know, cares for an elderly loved one at home, you know that while it may be a labor of love, it can have all the frustrations of a full-time job. Many people want to keep "mom" or "dad" at home, surrounded by their belongings and their loved ones. But, over time, staying at home can become isolating for the elder and perhaps socially limiting for the caregiver too. Many people bring help into the home but this article will highlight a more unique and less-known option, adult day care. Thankfully, there are safe and comfortable places where caretakers can take an elder during the day. These adult day care facilities act as a bridge of support between an elder living independently and receiving full-time care.

Each facility is unique but they share the similar goal of helping older adults maintain a life with dignity, meaning and purpose, while remaining as independent as possible.

Elderhaven – Austin & Round Rock

Austin has benefitted from an established facility, Elderhaven, which is part of a broader non-profit organization called Austin Groups for the Elderly (AGE). Since 1992 Elderhaven has offered seniors an activity-filled day with nursing care and nutritious meals. AGE operates two Elderhaven facilities, one in Round Rock and the other in central Austin near Guadalupe and 38th Street. The Central Austin facility adjoins the AGE Resource Center which has a wealth of information for caregivers as well as seminars and a free health equipment loan program.

Both Elderhaven adult day care facilities host between 30 and 40 seniors on any given day. Both are licensed by the Department of Aging and Disability Services (DADS) and employ a full time activity director, a full time nurse and a full time program director among other staff.

While the staff-to-senior ratio is required to be no greater than 8-to-1 by DADS, most of the time the ratio is much smaller, 5 or 6-to-1, not including the many volunteers who are not figured into the ratio. There is an enrollment process and payment is accepted via Medicaid, Veterans benefits, long-term care insurance and private pay on a sliding scale according to income. Transportation is provided free of charge.

continued

Javad at Elderhaven

Javad's son:
"It's been a year and half since I began bringing my father, Javad, to Elderhaven Day Center. My dad, now 96, has benefitted in so many wonderful ways from the various activities and the social interaction he receives at Elderhaven. I'd like to thank the AGE staff for going above and beyond to improve the quality of care provided to my dad. This has eased the burden on my sister and me, who both work. The staff has taken a sincere interest in dad's well being, and it gives me a peace of mind knowing my dad is in such a caring and productive environment during the days when I am at work and not able to care for him."



It's important that caregivers don't wait too long after a diagnosis of Alzheimer's or other dementia before enrolling their loved one in some type of program. Participation in some type of physical and mental activity every day is key to managing the disease. "The call we receive most often is from a frantic caregiver who can no longer cope with the overwhelming task of caring for a loved one 24/7," Alex Nameth explained. "It is critical that the caregiver recognize early the signs associated with memory loss and take action. The sooner the loved one is in an environment that provides a therapeutic-based medical and socialization program, the greater the benefits to the affected individual."



Gerard (in white) at Friends Place
Carol, whose father, Gerard, attends Friends Place regularly "has become a different person" since he started going to Friends Place. "It's a very special place—happy, loving, clean, light and fresh. I can't get over the change in Dad since he's been going there. They help give him routine and direction, and he gets a lot of TLC. His spirit and mood are much better and he loves to go!"

Friends Place – Richardson & McKinney
Friends Place in McKinney and Richardson specializes in caring for people with Alzheimer's and other memory loss impairments, however, having a dementia-related diagnosis is not required to attend the facility. As hands-on owners, Alex and Barbara Nameth are at the center daily. Alex is the activity director and Barbara, the facility director.

Friends Place offers a social and medical model of care with a requirement that the participants be ambulatory. The Richardson location has been open since 2005 and hosts about 40 elders on any given day. The McKinney location opened in 2010 and hopes to grow their participation. Friends Place accepts private pay and long term care insurance. They also offer caregiver resources and support groups that meet at the facility on a regular basis. Attendees at the support group can bring their loved one for free care during the meeting as well, which can make it so much easier to attend and can also be a nice introduction to the facility.

Adult Day Care Helps the Senior AND the Caregiver
Adult day care provides many important things for a family, but two stand out: 1) Important socialization for the senior, and 2) Respite for the caregiver. In all facilities, seniors are welcome to come as little or as much as needed. The activities provided in this care setting create an atmosphere that many seniors can enjoy - morning coffee and news, some exercise or a walk outside, music provided by volunteer performers, bingo, games that get them moving, afternoon movies, crafts and even the occasional "field trip" or shopping trip. This kind of socialization helps seniors feel needed and a part of something.

If you need help navigating the many care options for your loved one, contact AACM to find the best solution for your family.

Checklist to Help Choose an Adult Day Care Facility

1. **Licensing** - Is this center currently licensed by Texas Dept. of Health and Department of Aging and Disability Services?
2. **Atmosphere** - Is there a warm, caring atmosphere among clients and staff?
3. **Knowledge** - Are the staff and volunteers knowledgeable about the needs of the clients they care for?
4. **Needs** - Can the center meet the needs of my loved one?
5. **Visitation** - May we and other support persons visit the clients at any time?
6. **Physical Plant** - Is the center clean, attractive to adults, spacious and safe for mobility, have outside activity area?
7. **Information** - Have I been given helpful, written information and an intake packet?
8. **Respect** - Was my special adult treated with respect and evaluated by the professional staff, including the nurse on-site?
9. **Questions** - Were my questions answered and my concerns addressed?
10. **Location** - Is the center conveniently located to our home or work and accessible to our family?

Elouise:

In 1997, my health began to decline and my daughter and I worried



about me staying at home alone all day. It was then that we found Elderhaven.

This is the best adult day care! The staff is so nice and treats everyone with respect. I am able to still live with my daughter but get to spend all day with my friends keeping active with games and activities. There is so much to do here, that if you're ever bored, it's your own fault!

Seniors May be Missing Big Medical Expense Tax Deduction

The tax deadline is looming and this information could save seniors substantial money. It's common knowledge that the cost of **medical expenses** can be deducted if they exceed 7.5% of Adjusted Gross Income. But, seniors may be missing the deduction for **long-term care, non-medical costs** for a "chronic" condition (as defined by the IRS), in some cases.

"Most people who prepare taxes for elders, even tax professionals, may think only medical expenses can be deducted on an elder's tax return. But under a somewhat obscure IRS definition, non-medical procedures can also be deducted. This could be huge for some elders," said Mick Koffend, Registered Financial Gerontologist, and Director of Services at Accountable Aging Care Management.

According to Internal Revenue Code 7702B, a **chronically ill person** is defined as someone that meets either of the following descriptions:

1. He or she is unable to perform at least two activities of daily living (ADLs) without substantial assistance from another individual for at least 90 days due to a loss of functional capacity. (Activities of daily living are eating, toileting, transferring, bathing, dressing and incontinence.)
2. He or she requires substantial supervision to be protected from threats to health and safety due to severe cognitive impairment.

To qualify with the IRS for the deduction of long-term care, non-medical expenses for either or both of these conditions, the elder must obtain a letter from a licensed health care practitioner who is either a physician, a registered nurse or a licensed social worker. This letter must state that the taxpayer meets one or both of the conditions above and detail the plan of care prescribed to address these conditions. Deductible long-term care costs will be those that are consistent with the services prescribed by the plan of care.

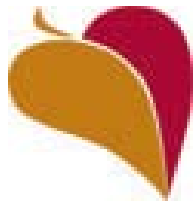
If you need assistance getting a letter from your doctor, please contact AACM, we can help.

Have you heard us speak lately?

The AACM Team has been out speaking to professional, social and private organizations about Care Management and many other topics. Some of our recent and upcoming speaking events include:

January 13	<i>Financing Sources of End of Life Issues</i>	Texas Health Presbyterian Hospital Dallas
January 21	<i>The Three M's of Health Insurance: Medicare, Medicaid</i>	San Antonio: The Egg & I
February 10	<i>Where do you turn with Eldercare Issues?</i>	Round Rock Rotary Club
March 2	<i>Financing Sources of End of Life Issues</i>	Methodist Dallas Medical Center
March 5	<i>Having the Conversation</i>	Austin: Emeritus at Spicewood Springs
March 15	<i>The Patient-Centered Triad</i>	Austin: Seton Northwest Hospital
April 15	<i>The Impact of Healthcare Reform on Medicare</i>	Austin: Location to be announced
April 26	<i>The Impact of Healthcare Reform on Medicare</i>	Round Rock: Seton Medical Center Williamson
April 26	<i>Having the Conversation</i>	Kyle: Seton Medical Center Hays
May 19	<i>The Impact of Healthcare Reform on Medicare</i>	Austin: University Medical Center Brackenridge
May 24	<i>Medicaid Update 2011</i>	Austin: Location to be announced

Do you need a speaker for an upcoming civic or church event? We'd love to speak to your group. Please check out our [presentations](#) on our website or call us about speaking.



Accountable Partners®

AACM regularly makes recommendations to clients for services they need such as facilities, home health care, and personal assistance services. If you are not in our Accountable Aging Partners Program (it's free), you may be missing out on valuable referrals. Please go to our website now and [fill out a survey](#). Having the most current information on your business helps us refer the right kind of clients to you. If you'd like to see what a sample Accountable Partners Report looks like, access a [Sample Profile](#).

Accountable Aging Care Management Team

Mary Koffend, President
Mick Koffend, Director of Services
Spencer Brown, MSG, LNFA, Care Manager
Mary Cooper, BS, RN, Care Manager
Jana Dodoo, Resource Coordinator
Shannon Gray, Marketing Coordinator
Diane Hayes, BS, RN, CHPN, ACM, Care Manager
Myra Richmond, MSG, CMC, Care Manager
Ruth Rivette, Office Manager
Deb Roush, RN, Nurse Consultant
Heidi Shanklin-Spock, LMSW, C-ASWCM, Care Manager
Mary Pat Smith, MSN, RN, CNS, Geriatric Nurse Consultant
Janet Troutman, Client Relations Manager
Cheryl Usry, MS, RD, Client Coordinator

Austin 512.342.9800
Dallas 214.206.1696
San Antonio 210.568.7934

Visit us online: www.accountableaging.com

Accountable Aging Care Management is an eldercare consulting and care management firm.

Accountable Aging is a single source for seniors and their families to attain knowledge, resources and on-going assistance with the challenges related to aging or caring for an elder loved one. We serve seniors in Austin, Dallas, San Antonio and the surrounding areas.

With this newsletter, our aim is to provide a trusted conduit for eldercare information and resources and to highlight the services we offer that meet the needs of senior adults and their families.

You received this newsletter because you previously opted into this service. If you no longer wish to receive email communications from Accountable Aging, please click here to [unsubscribe](#) or send an email to info@accountableaging.com (please write "unsubscribe" in the subject line). We value your privacy. [View our privacy policy](#).

Permission is granted for reproduction of this Newsletter, whole or in part, by the addressee, provided Accountable Aging Care Management is credited with the information used and the following statement is included: "None of this material should be construed as medical or financial advice."