



Our Aging
Everyday, a new horizon

Moving Checklist

Before the move

Physician Care in the New Location:

- Appointments should be made for visits within no more than 2 weeks of arrival.
 - Local physicians will need to make referrals for some services and usually have a working relationship with Medicare certified agencies with which they are used to working. However, it is a good idea to get recommendations ahead so that you can participate in the decision of which agency to use.
- Medical records should be hand delivered to the physician at the time of the first appointment.
- A **summary cover sheet** should be attached at the front of the records and include the following:
 - All diagnoses from all physicians & dates of diagnoses if possible
 - Dates of most recent hospitalizations and reason for admission
 - List of all medications
 - Date of Birth
 - Social Security #
 - Medicare or health insurance #
 - Any allergies to medications/foods
 - List of medical equipment that is currently in use
 - Description of cognitive or behavioral challenges.
 - POA assignment

Get referrals and find ...

- Primary Care Physician _____
Name, address and number
- Cardiologist _____
Name, address and number
- Neurologist _____
Name, address and number
- Occupational Therapist _____
Name, address and number
- Physical Therapist _____
Name, address and number
- Hospital _____
Name, address and number

- Pharmacy _____
Name, address and number
- Dentist _____
Name, address and number
- Podiatrist _____
Name, address and number
- Ophthalmologist/Optician _____
Name, address and number
- Audiologist/Hearing aid specialist _____
Name, address and number
- Other _____
Name, address and number
- Other _____
Name, address and number
- If the person has a history of needing to use in-home rehabilitative services, it is a good idea to have the name and number of a local agency.

Name, address and number

Medical Records:

Medical records should be obtained in advance of any move.

- Primary Care Physician _____
Name and number
- Cardiologist _____
Name and number
- Neurologist _____
Name and number
- Occupational Therapist _____
Name and number
- Physical Therapist _____
Name and number
- Hospital _____
Name and number

- Power of Attorney assignment paperwork included in this package.

- Power of Attorney should always maintain a duplicate copy of medical records to assure that information is not lost in the moving process.

Medication Records:

- A list of all
 - current routine medications
 - “as needed” medications
 - discontinued medications

- **ALL** supplements

NOTE: If a medication dispenser is used, this should accompany the person to their new location even if it will not be needed in the new location (i.e. person is going into a residence in which medications are distributed by staff).

Person must travel with at least a 30 day supply of medications.

Medical Equipment:

Whenever possible, the plan should be to take medical equipment, adaptive and safety devices with the person as they travel to their new location. Portable items include:

- Walkers
- Canes
- Wheelchairs/scooters – manual and power (can usually go on a plane in cargo)
- Oxygen or oxygen concentrator (may need to be returned to provider in the future)
- CPAP machine
- Detachable bed rails
- Injectable medications & supplies
- Glucometer
- Blood Pressure cuff
- Nebulizer
- Continence supplies for a month
- Extra batteries and ear pieces for hearing aids –a month's supply
- Extra glasses and/or contact lenses
- Dentures
- Reachers and adaptive eating utensils

Items that will need to be installed prior to the arrival of the care recipient, if they are necessary (most of these items are not covered under Medicare and therefore you won't need a prescription from a local physician for them). These items can be found through a medical supply or durable medical equipment company.:

- Ramps if there are entry steps
- Auto lifts for power chairs and scooters
- Hospital bed, if required
- Stair chair lift if necessary
- Shower seat & hand held shower head
- Grab bars in shower and toilet area
- Commode chair, if toilet is low or if it will be needed at the bedside
- Entry and bathroom doors widened, if a wheelchair is in use or anticipated
- Good scale if there is Congestive Heart Failure (CHF)

- Lift chair to help with transfers and keeping legs raised (this may be partially covered under insurance)

Health Insurance:

If on traditional Medicare with a supplement, no action is needed as this is portable across states.

If on a Medicare managed care policy ...

- you will need to establish residence in your new state
 - o www.Medicare.gov is the website to obtain information for your new state.
- Apply for a new policy.

Transportation:

Flying?

- Get medical clearance to fly from
 - o Primary care Physician and/or
 - o Cardiologist
- Contact airline for assistance with
 - o Wheelchair
 - o Oxygen
- Person physically or cognitively compromised?
 - o Best to arrange a person to travel with them, who is familiar with their functional capabilities/limitations travel with them to assure a safe transition.
 - Travel companion: _____
Name and cell number

NOTE: There are multiple air ambulance services for people who cannot travel without medical support. This can be quite expensive and is usually not covered by most health insurers.

Driving?

- Schedule should allow for plenty of ...
 - o Rest stops
 - o Bathroom stops
 - o Meal Breaks
- Overnight stays if it is more than a few hours distance
If the person has confusion or agitation, disorientation or behavioral issues during travel can be a concern
 - o Consult the
 - Neurologist _____
Name and number
 - Psychiatrist _____
Name and number

Legal Documents:

The following documents should accompany the person traveling. Be sure all documents are up to date and legal in the new residence state:

- Health insurance card/Medicare card
- Medicare Part D Prescription Provider information
- Driver's license or state ID card with photo and/or passport
- Power of Attorney
- Healthcare Surrogate (may be the same document, depending on the state in which it was originally drawn)
- Advanced Directive/Living Will (same as above)
- Copies of any trusts (may or may not exist)
- Copies of Last Will and Testament
- Copy of Long Term Care Insurance card
- Death certificate of a spouse (when applicable)
- Naturalization papers (when applicable)
- VA discharge documentation

Additional documents that should be located for future use include:

- Deeds to real property
- Insurance policies – life, long term care, disability, homeowners
- List of special bequests
- Bank accounts
- Investment accounts
- Auto registration & insurance
- Preneed funeral arrangements & cemetery plot
- Prior year's tax return

Financial Information:

- List of all sources of income, amounts & dates of deposit – Social Security, retirement/pension income, VA benefits, IRA/ROTH transfers
- Verify that current banking institution is a national or local bank. If local bank, new accounts need to be opened in new residence state.
- If income is going direct deposit into existing accounts, **do not** change the deposits until new accounts are established in the new location
- Information about current checking and savings accounts
- Information about investment accounts
- Review, catalogue and determine which credit/debit cards to keep and which to cancel. It is a good idea to limit the number of open accounts. There may also be reason to consider monthly limits on specific spending accounts
- Add name of POA to accounts in new location
- Obtain application for "Aid & Attendance" support through the VA

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- Do not transfer assets out of the care recipient's name if there is a possibility of having to apply for Medicaid benefits in the future.** There is a five (5) year "look back" period that could disqualify someone for benefits, if assets have been transferred out of their name within this "look back" timeframe.
- Do not change official residency** until it is certain that the care recipient will be remaining in the new location. This can affect tax status and homeowner exemptions on property. Consult an Elder Law Attorney on these matters within the new state of residency.

Clothing:

- Care recipient should have enough clothes for a month and for any changes in season that will occur. It is important to realize that when changing climate zones, the person may need an adjustment period to adapt to different weather.
- In warmer climates, air conditioning may be too cold for people who are not used to it.
- Homes may need heaters or indirect fans to help with the adjustment. Room vents/radiators may need to be opened or closed to arrive at the right temperature settings for a particular part of the home.
- Layers of clothes are also helpful as body temperature fluctuates over the course of a day.
- Clothing should be loose, but not drag on the floor.
- Waistbands of elastic are often easiest and most comfortable.
- Shoes should be closed toe for safety and security, unless there is a foot ailment that prevents this. Rubber soles are also helpful. Velcro closures make getting shoes on and off easier.

Furniture & Valuables:

- Valuables should be catalogued with pictures and descriptions.
 - Anything that the person will not be using in the new location should be stored in a safe place, such as a vault or safe deposit box. Items that are designated for specific family members should be labeled by the care recipient.
- Furniture that is of monetary or sentimental value should be moved to the new location, if possible.
 - Having a few familiar items often help to ease the transition into the new environment. Often when people move, they are downsizing and many items will not be appropriate for the new space. Decisions about what to keep should recognize the values and desires of the care recipient to the extent practical.
- Family pictures or other personal possessions that will make the new location feel familiar and home-like can accompany the care recipient to the new location and will often help with the transition, as well.