A Family Guide

Planning, Records & Support for the Road Ahead

This book belongs to your family. Use it to keep the details that matter in one place — who to call, what has been decided, and what still needs a decision.

Resident name Date

Prepared by

Welcome

You have made the decision. Here is what comes next.

Signing the agreement was a major step, and it is normal to feel relief and doubt at the same time. This book exists to take some weight off your shoulders. Rather than trying to hold every phone number, every wish, and every decision in your head during a stressful season, you can write it down once, here, and know where to find it.

Some of what follows — end-of-life planning, funeral arrangements, memorial wishes — is difficult to think about. You do not have to complete it today. Families consistently tell us that making these decisions calmly, in advance, is far kinder than making them in a hospital corridor at two in the morning. Work through it at your own pace.

How to Use This Book

- Fill in what you know. Leave the rest blank and come back to it — nothing here has to be finished in one sitting.
- Keep it somewhere findable. Tell at least one other family member where it lives.
- Bring it to appointments. The contacts and medication sections are useful at the doctor's office and the hospital.
- Update it when things change. Pencil is your friend.
- Ask us for help. If a section raises a question, our team is glad to talk it through with you.
- Use this book as a great resource - if you go on vacation and another family member is the emergency contact for a week - this book is a great resource. If you move out of state and another family member is becoming a more active contact for your loved one, use this book as your reasouce.

> *This book is for your family's own record-keeping and planning. It is not a legal document, and it does not replace advice from an attorney, physician, or funeral director. Where a section touches on legal or medical decisions, please use it as a starting point for a conversation with the right professional.*

What's Inside

1

FACILITY CONTACT INFORMATION

Section 1

Facility Contact Information

Who to reach at Mount Vernon, and when.

1 · Facility Contact Information

Who to reach at Mount Vernon of South Park

Our main number is answered around the clock. If you are not sure who you need, call the main line and we will route you to the right person.

Main Line (24 hours)	**412.567.3094**
Address	1400 Riggs Road, South Park, PA 15129
Website	mountvernonpersonalcare.com

Your Care Team

Role	Name	Reach out about…
Administrator	Jill Mason	Overall concerns, billing, anything unresolved
Residential Care Coordinator	Eileen Lippl	Day-to-day care, routines, care plan questions
Admissions	Chrissy Meduho	Paperwork, move-in, agreement questions

Good to Know

- Call any time. Nights and weekends are staffed — you will always reach a person.
- We will call you first if there is a change in condition, a fall, or a hospital transfer.
- Ask for the nurse on duty if you want a quick update on how the day has gone.

> *Write down the direct extension or best time to reach each person as you learn them — there is space in the Notes section at the back.*

2

FAMILY CONTACTS

Section 2

Family Contacts

Who we call, and in what order, if something happens.

2 · Family Contacts

Who we call, and in what order, if something happens

Please tell us who to call first. Naming a primary contact spares your family the confusion of everyone hearing different pieces of news at different times. The primary contact is who we reach for routine updates and in an emergency; the alternates are who we try if we cannot reach them.

> *Please make sure the people listed here know they are listed — and that the primary contact knows where this book is kept.*

Primary Contact

Name

Relationship

Mobile phone

Alternate phone

Email

Best time to reach

Address

Second Contact

Name

Relationship

Mobile phone

Alternate phone

Email

Best time to reach

Third Contact

Name

Relationship

Mobile phone

Alternate phone

Email

Best time to reach

Special Instructions

Anything we should know about who to call, when, or how? For example: “Do not call my mother at work before 5 p.m.” or “Call my brother first for medical decisions.”

3

MEDICAL CONTACTS

Section 3

Medical Contacts

Primary care, specialists, pharmacy, and insurance.

3 · Medical Contacts

Primary care, specialists, pharmacy, and insurance

Keeping these details in one place makes every appointment, hospital visit, and phone call easier. Fill in what you know now and add to it over time.

Primary Care Physician

Physician name

Practice

Phone

Fax

Address

Last visit

Next appointment

Specialists

Cardiology, neurology, podiatry, dentistry, audiology, ophthalmology, or anyone else seen regularly.

Specialty	Physician	Phone	Last seen

Pharmacy

Pharmacy name

Phone

Address

Insurance & Identification

Coverage	Plan / Carrier	ID / Policy number
Medicare		
Medicaid		
Supplemental		
Prescription		
VA benefits		

Allergies & Key Medical History

4
POWER OF ATTORNEY

Section 4

Power of Attorney

What it is, why it matters, and how to put one in place.

4 · Power of Attorney

What it is, why it matters, and how to put one in place

A power of attorney (PoA) is a legal document in which your loved one names someone they trust to make decisions on their behalf. It is one of the most valuable things a family can have in place, and one of the most common things families wish they had handled sooner.

The Two Kinds You'll Hear About

Financial PoA	Authorizes someone to handle money matters — paying bills, managing accounts, handling benefits and insurance paperwork.
Healthcare PoA	Authorizes someone to make medical decisions if your loved one cannot speak for themselves. Often paired with a living will that records treatment wishes.

Why Have One

- It keeps the decision inside the family. Without a PoA, no one automatically has authority — not even a spouse or adult child.
- It avoids guardianship. If capacity is lost with no PoA in place, the alternative is a court process that is slow, public, and expensive.
- It prevents crisis decisions. The agent already knows what your loved one wanted, because they discussed it in advance.
- It removes practical roadblocks. Banks, insurers, and benefit offices will not discuss an account without documented authority.
- It protects relationships. When wishes are on paper, families argue far less about what Mom or Dad "would have wanted."

> *Timing matters. A person must have capacity to sign a PoA. If your loved one is living with dementia, please do not delay this conversation — the window to act may be narrower than it seems.*

How to Get One Started

1. Talk with your loved one, while they can take part. Their wishes and their choice of agent are the whole point of the document.
2. Choose the agent — and a backup. Pick someone trustworthy, level-headed, reachable, and willing to serve.
3. Contact an elder law attorney. Pennsylvania has specific requirements for signing, witnessing, and notarization; an attorney makes sure the document will actually hold up when it is needed.
4. Sign, witness, and notarize as required. An improperly executed PoA can be refused exactly when you need it most.
5. Distribute copies. Give one to the agent, one to the physician's office, one to Mount Vernon, and keep one with this book.
6. Revisit it periodically. Confirm the named agent is still the right person and still willing.

Where to Find Help

- Elder law attorney — the most reliable route; many offer a flat fee for a basic PoA package.
- Allegheny County Bar Association Lawyer Referral Service — can connect you with a local elder law attorney.
- Southwestern PA Area Agency on Aging — guidance and referrals for older adults and caregivers.
- PA Legal Aid Network — assistance for those who qualify financially.

> *Please treat this page as a plain-language overview, not legal advice. An attorney should prepare or review the actual document.*

Our Power of Attorney Record

Once a PoA is in place, record the details here and give Mount Vernon a copy for the resident's file.

Financial PoA — agent name Phone

Date executed Attorney / firm

Where the original is kept

Healthcare PoA — agent name Phone

Date executed Attorney / firm

Where the original is kept

Alternate / successor agent Phone

Document Checklist

Document	In place?	Date	Copy to MV?
Financial power of attorney			
Healthcare power of attorney			
Living will / advance directive			
POLST or out-of-hospital DNR			
Last will and testament			
Trust documents (if any)			
Deed / title records			
Insurance policies			

5

END-OF-LIFE PLAN

Section 5

End-of-Life Plan

Recording wishes before they are needed.

5 · End-of-Life Plan

Recording wishes before they are needed

This is the hardest section in the book, and the one families are most grateful to have completed. Writing these wishes down does not make anything happen sooner. It simply means that if a decision ever has to be made quickly, it will be your loved one's decision being honored — not a guess made under pressure.

> *Have this conversation early, while it can be unhurried. Ask what a good day looks like, what they would want if they could no longer speak for themselves, and what matters most to them at the end. Then write it down.*

Advance Directives

Living Will	A written statement of what treatment your loved one would or would not want if they became unable to decide.
POLST	Pennsylvania Orders for Life-Sustaining Treatment — a bright pink medical order signed by a physician that travels with the resident. It tells EMS and hospital staff what to do.
DNR	Do Not Resuscitate — a physician order directing that CPR not be attempted.

Wishes on Record

Item	Yes / No	Date	Copy to MV?
Living will completed			
POLST form completed			
DNR order in place			
Hospice preferences discussed			
Organ donation wishes recorded			
Religious or spiritual wishes recorded			

In Their Own Words

What matters most to your loved one about comfort, dignity, who is present, faith, and the care they would want at the end of life?

6

BURIAL & FUNERAL ARRANGEMENTS

Section 6

Burial & Funeral Arrangements

Why to plan ahead, and how to begin.

6 · Burial & Funeral Arrangements

Why to plan ahead, and how to begin

Very few families regret making arrangements in advance. Many regret not having done so. When nothing has been decided, the people who are grieving hardest are the ones asked to make a dozen decisions and sign for significant expense within about forty-eight hours.

Why Arrange in Advance

- It spares your family decisions in the worst week of their lives. Everything is already chosen.
- It controls cost. You can compare prices calmly, and prepaid plans can lock in today's rates.
- It prevents disagreement. Wishes on paper settle questions before they become arguments.
- It honors what they actually wanted. Burial or cremation, a large service or none — their choice, recorded.
- It removes financial pressure. Grieving families tend to overspend; a plan protects against that.
- It can help with benefits. Certain irrevocable arrangements are treated differently for Medicaid eligibility — ask an elder law attorney.

> *You do not have to prepay to plan ahead. Simply writing down preferences and choosing a funeral home is a large step by itself.*

How to Get the Ball Rolling

1. Ask about burial or cremation first. Nearly every other decision follows from that one.
2. Choose a funeral home. Call two or three. By law they must give you a printed, itemized price list on request.
3. Ask for the General Price List and compare. Prices for the same services vary widely between homes.
4. Decide what to prepay, if anything. Options range from recording wishes only, to a fully funded prearranged plan.
5. Confirm cemetery or cremation details. Plot, marker, and opening/closing fees are usually separate from the funeral home's bill.
6. Check veteran eligibility. Veterans may qualify for burial benefits, a government headstone, and a national cemetery plot.
7. Write it all down here and tell the family where this book is kept.

Funeral Home

Funeral home

Director

Phone

Address

Arrangements made? (yes / no)

Date arranged

Prepaid? (yes / no)

Contract / account number

Burial or Cremation

Preference	
Cemetery / crematory	
Address	
Plot / lot / section	
Deed or certificate held by	
Marker or headstone	
Inscription wishes	
Veteran benefits?	

Notes on Arrangements

7

MEMORIAL & SERVICE WISHES

Section 7

Memorial & Service Wishes

The details that make a service theirs.

7 · Memorial & Service Wishes

The details that make a service theirs

These are the small, personal choices that turn a service into a true reflection of a life. Record whatever is known — even partial answers help enormously.

Service Details

Type of service	
Location / place of worship	
Officiant or clergy	
Open or closed casket	
Viewing or visitation	
Music or hymns	
Readings or scripture	
Flowers or memorial donations	
Pallbearers	
Military or fraternal honors	
Reception afterward	

Obituary Information

Gathering these facts in advance saves a great deal of scrambling later. Newspapers charge by length and have deadlines, so having this ready is a genuine kindness to whoever writes it.

Full legal name

Nickname or preferred name

Date of birth

Place of birth

Parents' names

Spouse

Marriage date and place

Military service

Education

Career / employer

Church or affiliations

Clubs, hobbies, passions

Survivors & Preceded in Death

Life Story, Accomplishments & Personal Touches

What should people remember? A favorite saying, a lifelong hobby, the thing they were known for.

Publication

Newspapers / outlets	Photograph to use

8

CARING FOR YOURSELF

Section 8

Caring for Yourself

You matter in this too.

8 · Caring for Yourself

You matter in this too

Caregiving does not end when a loved one moves into personal care. It changes shape. Many families are surprised to find that the exhaustion catches up with them after the move, once the adrenaline of managing a crisis finally drains away. That is normal, and it deserves attention.

> *Caregiver stress is not weakness and it is not a character flaw. It is the predictable result of carrying something heavy for a long time. Noticing it early is how you keep it from becoming something worse.*

Signs of Caregiver Stress

Any of these can show up on their own. Several at once, over several weeks, is worth talking to your doctor about.

Emotional	Physical	Behavioral
Constant worry	Exhaustion that sleep won't fix	Withdrawing from friends
Irritability or anger	Trouble sleeping	Losing interest in things you enjoyed
Sadness or hopelessness	Headaches or body pain	Trouble concentrating
Guilt, no matter what you do	Getting sick more often	Drinking or medicating more
Feeling numb or detached	Appetite or weight changes	Neglecting your own appointments
Resentment you feel ashamed of	High blood pressure	Snapping at people you love

> *If you are having thoughts of harming yourself, or you feel you cannot go on, please reach out right now — call or text 988 to reach the Suicide & Crisis Lifeline, any hour of the day. You deserve support too.*

Your Caregiver Support Plan

A plan you actually write down is far more likely to happen than a good intention. Fill this in for yourself.

One thing I will do each week for me ______ When ______

Person I can call just to talk ______ Phone ______

Someone who can share the load ______ What they'll take on ______

My own doctor ______ Last time I went ______

Support group I'll try ______ Meets when ______

A warning sign I'll watch for in myself ______

Permission Slips

Read these as often as you need to.

- You are allowed to rest without earning it.
- You are allowed to feel relief. It does not mean you love them less.
- You are allowed to say no to things that drain you.
- You are allowed to grieve someone who is still here.
- You are allowed to accept help — and to ask for it twice if the first ask went unheard.
- You are allowed to have a good day. That is not betrayal.

Local Support & Resources

Resource	How it helps
Mount Vernon of South Park	Start with us. Our team can point you toward local support and talk through what you're facing. 412.567.3094
Allegheny County Area Agency on Aging	Caregiver support, benefits counseling, and referrals for older adults in the county.
PA Link to Aging & Disability Resources	Statewide help finding local services. 1.800.753.8827
Alzheimer's Association	24/7 helpline staffed by specialists, plus caregiver support groups. 1.800.272.3900
Family Caregiver Support Program	Pennsylvania program offering caregiver reimbursement and respite assistance for those who qualify.
988 Suicide & Crisis Lifeline	Call or text 988, any time, for immediate emotional support.
Your faith community	Pastoral care, visitation, and practical help are often available just for asking.

My Own Support Contacts

Support group / contact ____________________ Phone ____________________

Counselor or therapist ____________________ Phone ____________________

9
NOTES

Section 9

Notes

Questions, updates, and anything worth remembering.

9 · Notes

Questions, updates, and anything worth remembering

Use these pages for questions to ask at the next visit, names and extensions as you learn them, dates of appointments, or anything you want to hold onto.

Notes

Notes

You did not fail your loved one by choosing Mount Vernon.

You made sure they would be cared for. Now let us carry some of the weight, so you can go back to being family.

Mount Vernon of South Park
1400 Riggs Road, South Park, PA 15129 • 412.567.3094