



NAVIGATION KIT

(Free Service for Medica Members)

**The information, tools and services you need
to shine on in the second half of life.**

You or your loved one may be facing a challenge because of a medical or age-related crisis. All of us at Lifesprk understand that you may have many questions. How do we decide what to do? Where will we find trusted advice and counsel? What support options are available? Which resources match my situation? How can I stay in control of my life? How can I maintain my independence and dignity?

This kit will help you answer these questions. Although your situation may not be simple, our navigation approach is "Easy as 1-2-3." It includes a Discovery Questionnaire and Priorities List to help you identify and prioritize your needs and wishes. Choosing a trusted advisor who is competent, experienced and compassionate is next. With that trusted advisor, you can evaluate options and match available services with your unique needs and wishes. The result - you will become empowered to make informed decisions and stay in control of your life shining just the way you want.

Step One: Beginning with You

Complete the enclosed Discovery Healthy Living Questionnaire and Priorities List to identify your needs and wishes. This is a great place to start. Writing about your current situation, about living, and what's most important in your life is the foundation for thoughtful conversation and wise decisions.

Step Two: Empowering and Igniting You

Once you identify your priorities, you are ready to choose a trusted advisor. Your advisor can assist you to evaluate options, match resources and guide your path to your goals according to your unique situation. You will be empowered with information and options. With the assistance of a trusted advisor, you will make decisions to improve your present circumstance and your future.

Step Three: Supporting You

Once you have made your decisions see the enclosed checklists so you can select the best providers and resources that match your needs and wishes.

Although we've made this navigation kit simple, the task of navigating the health care system and community services and matching those resources to your priorities is complex. If you feel overwhelmed or confused at any time during this process, please give us a call. As a trusted resource on shining in the second half of life and current advisor to thousands of seniors and their loved ones, we would be honored to assist you with any need, no matter how big or small. We will gladly connect you to an experienced navigator for a FREE Discovery Consultation.

Contact us at 866-208-6051 or email us at ShineOn@Lifesprk.com for help finding your "best fit" resources in any of the 7 elements of wellbeing.

We hope you find this navigation kit helpful in your quest to Shine On!



Best regards,



Joel Theisen, RN
Lifesprk Founder & CEO



BEGINNING WITH YOU

STEP ONE

Discovering and prioritizing your
unique needs and wishes.



Q DISCOVERY

The second half of life isn't always easy but our choices can be made more gracefully if we prepare well. Few of us take time to write down on paper what is important to us – our needs and wishes. As you age, you may confront a crisis that will require making quick decisions and it helps to have considered what you want. Use this questionnaire to begin your preparation and to capture what really matters to you. It's organized into seven key areas listed below.

Seven Elements of Wellbeing

Health & Wellness
Home & Safety
Finances
Thinking & Memory
Support System
Identity
Purpose & Passion

If you or your loved one is in a hospital or health care facility due to your current health status, you will need a plan for discharge. The health care staff will begin developing your plan. This questionnaire will help you organize your information during this process. Clearly communicating your needs and wishes is the cornerstone of a quality plan that will meet your immediate needs, as well as your long-term wishes.



A.) Let's get started!

Complete the Healthy Living Questionnaire to identify your or your loved one's priorities.

Instructions

- Review each question and write down your initial thoughts. You can explore these areas further if you identify them as top priorities.
- Check the box next to the question if it is a top priority.
- Skip any question or area that does not apply.
- When you have finished, turn to page 7 to list your top priorities – those things that are “a must” to consider as you plan your future.

Health & Wellness

Your current health status is critical to how you experience life. It's important to create as much stability as possible prior to making decisions for your future well-being.

- How do you currently feel? _____
- How do you describe your overall health and wellbeing? _____
- How well do you sleep – are you getting enough rest? _____
- How well do you eat? _____
- How is your balance – are you concerned about falling? _____
- List your current and chronic medical conditions (diabetes, high blood pressure, arthritis, heart disease, cancer, other)
- _____
- _____

Does your doctor describe this as a short-term condition or one requiring long-term medical attention?

*Any question you checked with an (X) should be added to your priority list as it may drive your decisions.

continue to next page >>

Healthy Living Questionnaire

[] As you review this list, check the areas you need or want assistance with.

- | | | | |
|-----------------------------------|--------------------------------------|------------------------------------|---|
| <input type="radio"/> Meals | <input type="radio"/> Transportation | <input type="radio"/> Housekeeping | <input type="radio"/> Laundry |
| <input type="radio"/> Medications | <input type="radio"/> Bathing | <input type="radio"/> Dressing | <input type="radio"/> Grooming |
| <input type="radio"/> Toileting | <input type="radio"/> Injections | <input type="radio"/> Walking | <input type="radio"/> Transfer to/from bed, chair |
| <input type="radio"/> Wound care | <input type="radio"/> Catheter care | <input type="radio"/> Feeding tube | <input type="radio"/> Mechanical lift |
| Other _____ | | | |

Home & Safety

These questions will help improve or maintain your independence and safety in your current home or when looking at alternative housing options.

[] What people are available and willing to help you in your home on a daily basis?

[] Describe some of the things you think need repair or may not be safe in your home.

[] What changes need to be made to your current home if you need to use a walker, wheelchair or other adaptive device? _____

[] Describe your willingness to make changes to your current home so you can continue to live there.

[] Are you willing to move to a new residence if your medical needs require more support than can be provided in your current home? _____

Finances

These questions will clarify plans and choices for your financial future.

[] Describe concerns you have about running out of money in your retirement years.

[] Do you live on a fixed income? _____ [] Do you have a monthly budget? _____

I have the following resources available to pay for services if I need or want them:

- Pension Social Security Investment Income Own Home Trust Fund
 Other _____

*Any question you checked with an (X) should be added to your priority list as it may drive your decisions.

- There are alternative ways to finance your housing and service needs. Which of these options do you need to be informed about?
- Medical or Financial Assistance Veteran's Benefits Medicare
- Long-Term Care Insurance Private Fund Management

Support System — People in Your Life

These questions will identify the important people in your life. They include your family, friends, neighbors, church members, etc. Your support may be a committed spouse or partner, a long-time friend, a trusted advisor or a professional agency.

- Whom do you live with? _____
- Whom do you include in your informal support system?
(family members, friends, neighbors, church members, others) _____
- Do you have someone currently helping you with your daily needs and activities? _____
- Are there people in your life now who rely on you for their activities of daily living? _____
- Whom do you confide in? _____
- Do you have someone in your life whom you do not trust? _____

Thinking & Memory

These questions will help to identify your ability to problem-solve, think, remember, make decisions, and target areas which may require support.

- Describe how well your memory works. _____
- Has your doctor diagnosed you with dementia or Alzheimer's? _____
- Describe how well you are able to care for yourself. _____
- Describe your mood: are you happy or do you feel "down"? _____
- What are your concerns about your mental health? _____
- Has a doctor suggested you may have depression or a mental health disorder? _____
- Are you taking medication for a memory or mental health condition? _____

Purpose & Passion

What gets you out of bed in the morning? What keeps you going throughout the day? What makes you feel good when you go to sleep at night? Recognizing your purpose and passions can help you discover new possibilities for a sparked life.

- [] How do you enjoy your leisure time? (fishing, listening to music, knitting, TV, reading, being outdoors, other)

- [] Are you happiest when you are alone, with others, in small groups, or with lots of people?

- [] What activities do you do that feel meaningful, purposeful?
(spending time with grandchildren, cooking, doing handiwork, gardening, volunteering, reading to children, other)

- [] What in your life makes you feel hopeful? _____
- [] What things did you do earlier in your life that you would enjoy doing now?

- [] List activities or interests you would like to participate in.

- [] Are pets significant in your life? _____

Identity

Identity is about who you are and what is important in your life. Your identity includes your family and ethnic history, your childhood, education, work, travel, and more...

- [] What roles have been important to you? (parent, spouse, son/daughter, provider, mentor)

- [] What makes you laugh – what makes you cry? _____
- [] How has your spouse or partner shaped the person you are today? _____
- [] How has your job or vocation shaped who you are today? _____
- [] How have your political beliefs affected your life? _____
- [] How are your ethnic roots an important part of your life? _____
- [] How have the times in which you've lived shaped you? (World War II, Vietnam War, other)

- [] How has your spiritual life contributed to who you are? _____



B.) Finishing Step One: Create your Priority List

As you age, your health and financial status become important factors, although they aren't the only areas that define your ability to age well and to experience a satisfying life. Any imbalance in the seven elements, outlined earlier, could strip away your control and independence.

Setting clear priorities will guide you to make wise decisions. For example, if connecting with people with similar interests and passions is important, include that on your priority list. If living with your spouse or partner is a priority, that too should be on your list.

Now, using the information from the Healthy Living Questionnaire, create your Priority List.

Remember to include items from the healthy aging questionnaire you marked with an [X] on your priority list because of their important impact on your options and decisions.

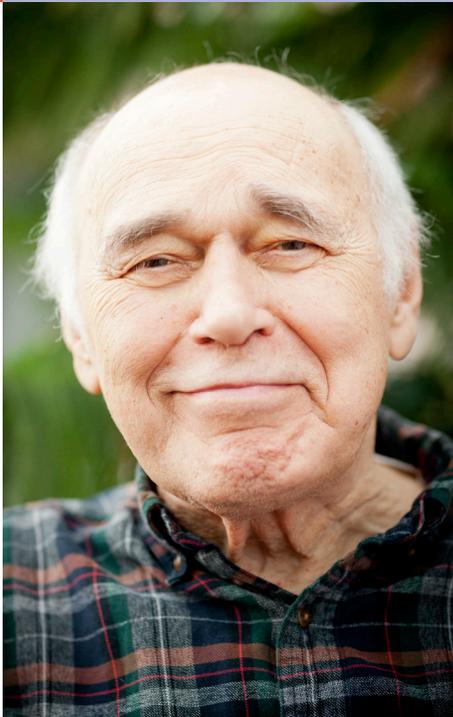
The next steps are to choose a trusted advisor, and to discover your community's resources and options. These steps will empower you to make wise decisions that can spark your life. **Move on to Step Two**



EMPOWERING YOU

STEP TWO

Selecting your trusted advisor to explore and match your unique needs and wishes with the best services the community has to offer.



A.) Find a trusted advisor.

Navigating the fragmented and confusing health care and community services systems on your own can leave you feeling uncertain and overwhelmed. There are so many options and literally hundreds of providers to choose from in your community.

Gathering the critical information you need to make the best decisions is not something you need to do alone. Step two of this kit strongly suggests finding a trusted advisor – someone who knows and understands services for people in their second half of life. Your advisor will assist you to explore and match available resources with your unique needs to improve your ability to age well in the future.

Consider one of the following trusted advisors:

Social
Worker



Physician

Other
(Clergy, Attorney,
Financial Advisor)

My Trusted Advisor is: _____ Phone: _____



B.) Evaluate the options.

Your knowledgeable advisor can help you evaluate the wide variety of options available to you. You will want to consider all your priorities in the areas of health and wellness, home and safety, finances, social supports, purpose and passion, thinking and memory, and identity. Use the list on the next page and refer to your Healthy Living Questionnaire and Priorities List (in step one of this kit) to guide your discussion of community services and resources with your trusted advisor.

Community Services and Resources Available

Please check the options that interest you

- Care Management
 - Life Care Management
 - Geriatric Care Management
 - Home Health Care
 - Private-Pay, Personal Care Assistance, Skilled Care (Medicare, Medicaid, Insurance), Infusion Therapy, and Home Oxygen and Medical Equipment
 - Homemaking Services
 - Companion Services
 - Therapy
 - Physical
 - Occupational
 - Speech
 - Emotional and Psychological
 - Addiction
 - Chemical Dependency
 - Alternative Medicine
 - Hospice and Palliative Care
 - At Home Services
 - In-patient Services
 - Residential Care
 - Dining and Nutrition
 - Senior Dining Programs
 - Meals on Wheels
 - Home Management Services
 - Handyman Services
 - Adaptive Equipment
 - Fall Prevention
 - Home Modification
 - Food Delivery Services
 - Housekeeping
 - Lifeline
 - Housing Advisors
 - Adult Day Services
 - General Care
 - Memory Care
 - Independent Senior Housing
 - Market Rate Rental
 - Subsidized Rentals
 - Condominiums
 - Assisted Living
 - Apartment Style
 - Memory Care
 - Residential
 - Skilled Nursing Facilities
 - Rehabilitation Programs
 - Memory Care
 - General Care
 - Cognitive Testing and Support
 - Caregiver Support Programs
 - Disease Prevention and Management
 - Financial Services
 - Reverse Mortgages
 - Asset Protection
 - Power of Attorney
 - Bookkeeping Services
 - Long-Term Care Insurance
 - Bill Paying
 - Elder Law Attorneys
 - Transportation
 - Private-Pay
 - Public Transportation
 - Handicap Accessible
 - Lifesprk Wishes™
 - Lifesprk Life-Legacy Program
 - Volunteer Opportunities
 - Family, Faith and Community
 - Senior Community Centers
- And More...

Choose a trusted advisor who will be able to give you more information on these services.



After selecting your advisor and reviewing the community services and resources available, you are better equipped to make informed decisions. Which options best match your needs and wishes? And most importantly, which feel good to you – and right for you? Your choice or decision need not be limited to

one – many seniors choose multiple options to support them as they age. For example, you can receive home care services when you live in an assisted living facility. You can choose a nutrition program, a financial advisor, and companion services coordinated by a care manager. We recommend that you and your trusted advisor look at several alternatives that will work for you, taking into account financial considerations and service availability.

C.) My preferred choices:

This navigation process started with your needs and wishes. Its purpose is to assure that your choices in all areas of your life are clearly presented and respected. Regardless of whether care management looks appealing, home health or assisted living is your preference, or other services suit your priorities, the choice is ultimately yours.

For more information about this kit, finding a trusted advisor, or requesting a free Discovery Consultation, contact Lifesprk at 866-208-6051.

The next and last step includes providing you the tools and resources to act on the decisions you've made. Use the enclosed checklists (in step three) to select the best provider to help you to live a spark life today and tomorrow. **Move on to Step Three**



SUPPORTING YOU

STEP THREE

Navigating community services to fit
your unique needs and wishes.

STEP THREE:



A.) Get the information you need.

Knowing what you want is one thing. Knowing how and where to get it in your local community is another. Let your decisions from Step Two guide you in evaluating the individual providers who can best meet your needs and wishes.

This kit includes links to a selection of helpful tools and resources to inform and guide you. They include:

- A. Senior Care Providers: [LeadingAge Minnesota](#)
- B. Geriatric Care Management: [Aging Life Care Assoc](#)
- D. Adult Day Care: [National Adult Day Care Services Association](#)
- F. Memory Care: [Alzheimer's Assoc](#)
- G. Assisted Living, Nursing Homes: [Care Providers of Minnesota](#)
- H. Palliative Care: [National Hospice & Palliative Care Foundation](#)
- I. Advance Care Planning: [Honoring Choices Minnesota](#)
- J. Additional Senior Care Resources: [Lifesprk resource page](#)

If you would like help navigating any of these resources simply let us know.

B.) Want more?

Lifesprk can provide you with a variety of FREE tools from our resource library. Please use the check list on the next page and contact Lifesprk at:

Phone: 866-208-6051

Email: ShineOn@lifesprk.com

Online: www.lifesprk.com



Library of Resources for Seniors

Being in control of your own life is something we all cherish. This only grows more important as we age. Here are tools that Lifesprk has assembled to support and educate you and your loved ones. These resources can help you stay in control, maintain your independence, give you peace of mind, and most important, help you enjoy your life.

- Home Safety Checklist
- Emergency Preparedness Checklist
- Medication Safety Lists
- Important Questions to Ask the Doctor
- Advance Directives: Your Critical Action Plans
- Tips to Increase Balance, Flexibility & Endurance
- Life-Legacy Resources

Library of Resources for Caregivers

Caregivers may be any age, have diverse cultural traditions, and have varying financial circumstances. You may help your loved one from afar, or provide care in your own home. As a caregiver, you give your precious time. We've heard from caregivers that this role has given their lives meaning, the act of caregiving has given them value and a fulfillment in their lives - a job you do selflessly out of love. But at the same time, caregiving can be stressful for many reasons making it as much an emotional roller coaster as it is a physical one. Support is critical to ease the caregiver frustration and stress that comes from diverting you from other important family commitments, distractions at work, and in some cases, financial strain. Taking the time to care for yourself is equally as important as caring for a loved one.

We've pulled together several resources and tips to help make your caregiving role more manageable. If you have questions, concerns or need some respite, call us – we can help.

- In Home Provider Checklist
- 5 Tips for Channeling Those Senior Care Frustrations
- Jack Norton Family Respite Care - ALS Association
- Combatting Social Isolation in Seniors
- Understanding Caregiver Shortage
- 8 Warning Signs Seniors Need Help
- Tips to Make Senior Care Dollars Go Further
- Preventing Senior Falls

For additional tips about senior care visit our Seek On blog: www.lifesprk.com/seek-on

Making a Transition to a New Environment

Transitions are never easy, and are even more difficult when health and age complicate the move to a new environment. Here are resources to assist you in what to expect to make the transition as smooth as possible.

- [Elements of Excellence in Transitions of Care](#) (compiled by National Transitions of Care Coalition)
- [Transitions of Care: What You Need to Know](#) (National Transitions of Care Coalition)

Legal and Insurance Issues

Estate planning, health care directives, living wills, pensions, long-term care, Medicare – the list of options goes on and on. You can protect yourself and your loved one by learning what are the wisest choices for you now and in the future.

- [Public Benefits That Can Help You](#) (compiled by AARP)
- [Long-Term Care Insurance: Is it Right for You?](#) (AARP)
- [Medicare Basics: What You Need to Know](#) (AARP)

Financial Considerations and Issues

You or your loved one may have questions or concerns about your financial future and your ability to pay for services if you need them. We have compiled some resources that explain available programs and include contact information and application forms.

- [Medical Assistance Applications](#) (compiled by Department of Human Services)
- [Elderly Waiver Applications](#) (Department of Human Services)
- [Medical Assistance: Frequently Asked Questions](#) (Department of Human Services)
- [Medicare Program Benefits and Resources](#) (Centers for Medicare & Medicaid Services)
- [Retirement Planning: Questions to Ask](#) (EFS Advisors)
- [Saving for Retirement](#) (Financial Planners Association of Minnesota)
- [Living in Retirement](#) (CNN Money)

If you would like more information or have questions, e-mail your request to ShineOn@Lifesprk.com or call us with your request at **866-208-6051**.

Thank you for letting Lifesprk serve you!

Lifesprk SHINE ON™

Whole Person Senior Care

WELCOME TO WHAT'S POSSIBLE





Our Mission:
SPARK LIVES!

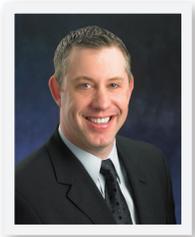
Our Vision:
By 2020, igniting 5 million lives
with our Lifesprk Experience™,
eliminating the roller coaster of crises.



It's all about the people

Lifesprk's leaders are passionate about improving the lives of seniors and have spent their entire careers serving them. With over 200 years of combined experience, our leadership team has extensive local and national expertise and knowledge. Lifesprk is the culmination of that passion and experience. The team has created an innovative service model to act as a catalyst to transform how our country cares for seniors.

Lifesprk believes that serving seniors is a rewarding experience and a serious responsibility. Therefore, we commit to selecting the most talented, compassionate and knowledgeable people in the industry...



Joel Theisen, RN, Founder & CEO

A nurse by education and an entrepreneur in spirit, Joel founded Lifesprk in 2004 to change the way our society views aging and to offer people in the second half of life the opportunity to shine just the way they want. His fast pace and high energy propels the company forward as he consistently seeks creative solutions and innovative ideas. He demands of himself and his team the highest standards, genuine commitment and passion.

Life Care Manager

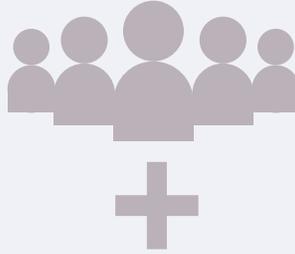
Lifesprk's Life Care Managers (LCMs) are Registered Nurses bringing years of experience to our team to make a difference - in your experience, your total cost of care, and your results. An LCM gives you personal, professional, proactive guidance through all life challenges, not just health issues. Whether you need short- or long-term care, or just want to prevent your need for care. Our proven results show that LCMs are the key to creating a better aging experience – helping seniors live the healthiest, most independent life possible, and their families a better, more balanced life.

Caregiver Services

Caregiving services at Lifesprk are different. Our caregivers not only provide the highest quality of care, they go above and beyond to make sure every person is living life with more meaning and purpose. Unlike traditional senior aide services, the caregiving at Lifesprk is deeply embedded in our Whole Person Senior Care approach.

Working alongside a dedicated LCM with expertise and compassionate care, Lifesprk caregivers get to know each person's unique needs and priorities to create a Whole Life Plan solution personalized for each senior. Then assist with all daily living needs with a focus on fulfilling each person's Life Plan and keeping the spark in life. Together, our proven process combined with ongoing Life Care Manager oversight and caregiver support, delivers the results you want and helps you live a happier, healthier, more independent life! What's more, our Navigation team can find your 'best fit' caregiver no matter where you live.

OUR PEOPLE



OUR PROCESS



Discover Explore our 7 Elements of living well to evaluate all areas of your life



Prioritize Identify personal goals to prioritize your needs and wants



Create Design a customized Life Plan to achieve your priorities



Empower Tap our team, insights and best practices for guidance



Ignite Connect with our trusted 7 Element partners to bring your Life Plan alive



Measure Enjoy the results and satisfaction of accomplishing your priorities



SHINE ON™

Whole Person Difference:

Seniors experience other life challenges beyond the physical ones. When left unchecked, they too, can lead to frequent ER visits and hospitalization.

That's why we created the Lifesprk Experience™ - a Whole Person Senior Care solution that is personalized to address the uniqueness of each individual. Our proprietary approach has cracked the code and is transforming the industry with unparalleled results - reducing client ER visits by 52% and hospitalizations by 73%! Plus, Lifesprk leads the industry in client and employee satisfaction.



Based on the 7 Elements of Wellbeing, the Lifesprk Experience™ takes a holistic, whole person approach to connect you to the right services to support your needs and wants.



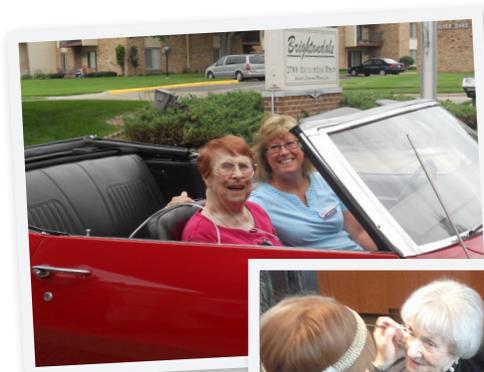
Lifesprk Wishes™

To assist in achieving our mission, Lifesprk has created a unique and important program called Lifesprk Wishes. Each month, our team selects several clients to participate in a memorable experience in which we take care of all the details. What makes a client smile? Better yet, what overwhelms them with joy? With each client it's something a little different, but whatever it is, we're passionately committed to figuring it out.

What is most important to you?

Consider a Lifesprk Wish...

- Celebrate a birthday or anniversary to remember
- Put your feet up for a day at the spa
- Let 'em roll at the casino
- Catch the big one on a fishing trip
- Reconnect with your childhood church
- Get swept away for a night at the theatre
- Take a joy ride in a convertible
- Capture a favorite childhood memory
- And many, many more...



Life-Legacies

Life-legacies are the written footprints we leave behind. They prove that we were here, we lived, mattered and made a difference. Legacies are a gift to ourselves today and to our loved ones tomorrow. Life-Legacy education and opportunities are an example of how Lifesprk's services go beyond just a medical focus. This is part of Lifesprk's unique, holistic approach to sparking lives, identifying each senior's individual needs within all elements of wellbeing. Consider preserving your legacy with the assistance of Lifesprk.

Thank you to the following organizations for their assistance in developing this Navigation Kit:



CONNECT WITH OTHERS ONLINE

You can also join in the fun and real-life sharing with our online community. There, you can connect with other families to swap answers, insights and success stories and then find out more about how Lifesprk can help you thrive.



Schedule a FREE Discovery Consultation

We'll learn about your priorities and what you're passionate about. Then we'll share options and discuss ways we can help you shine on!

866-208-6051 | lifesprk.com/Medica | ShineOn@lifesprk.com

Lifesprk would like to thank the social workers, discharge planners, nurses and many other healthcare professionals who provided their passion, insight, wisdom and time to inspire the creation of this important resource for seniors and their loved ones.