THE AGING IN PLACE
DIRECTORY HUB
Connecting People and Professionals

Caring From a Distance

A Workbook for Adult Children of Aging Parents

How to build a system that sees what you can't — from another city or state.

This workbook belongs to: _____

I am caring for: _____

They live in: _____ **I live in:** _____

Date I started: _____

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Use alongside the companion **Caring From a Distance Checklist**.

Before You Begin

"How am I supposed to take care of her from four states away?" If you've asked that question, this workbook is for you.

Here is the good news. Distance changes the job. It does not mean you can't do it. From far away, your job is not to be everywhere. Your job is to **build a system that sees what you can't**.

The long-distance sons and daughters who struggle the most are almost never the ones who care the least. They are the ones who find out last. That's because everything they know comes through the phone — and the phone is where parents are at their most convincing.

Workbook and checklist: how they work together

The **checklist** is your to-do list. It tells you *what* to set up.

This **workbook** helps you think it through. It helps you plan *how* to set it up for your family, practice the hard conversations, and decide what to do when something goes wrong.

Keep the checklist nearby. When you finish a part of this workbook, go check off the matching items on the checklist.

What's inside

Part	Topic	Part	Topic
Part 1	Where Things Stand Right Now	Part 6	Making Your Visit Count
Part 2	The Paperwork That Lets You Help	Part 7	Should I Move Closer?
Part 3	Building Your Local Team	Part 8	Your Emergency Plan
Part 4	Seeing More on Video Calls	Part 9	Your System on One Page
Part 5	Keeping an Eye on Money	Part 10	Resources and Next Steps

A note on words: This workbook often says "your parent," "she," or "Mom." Change the words to fit your family. Write in pencil. Come back to it. Your answers will change as your parent's needs change.

Part 1 Where Things Stand Right Now

Before you fix anything, get honest about what you actually *know* and what you are only *guessing*. Most of what you "know" may have come from your parent on the phone.

What I know vs. what I'm guessing

For each area, write what you believe is true. Then write **how** you know it. "She told me" counts — but mark it, because it's the easiest thing to get wrong.

Area	What I believe is true	How I know (she told me / I saw it / someone else told me)
Getting around the house		
Eating and groceries		
Taking medicines		
Paying bills		
Driving		
Going out and seeing people		
Sleep and mood		
Doctor visits		

Look at your table. Circle every answer where "how I know" is only "she told me." How many did you circle? What does that tell you?

The phone call vs. the real story

Often the first sign that something is changing doesn't come from your parent. It comes from someone else: a neighbor who says she hasn't been to church in a month, or a friend who says the car has a new dent.

Think about the last three phone calls with your parent. What did they say about how they're doing?

Has anyone else ever told you something your parent didn't mention? What was it?

What's one thing you only found out on a visit — something that never once came up on the phone?

Why do you think your parent didn't mention it? (Pride? Not wanting to worry you? Didn't notice it themselves?)

Keep this in mind

Your parent is not lying to you. Most older adults truly believe they are "doing great," or don't want to be a burden. That's exactly why you need other ways to see — not to catch them, but to help them sooner.

Part 2 The Paperwork That Lets You Help

The worst place to find out you have no standing is on a hospital phone line, calling from hundreds of miles away, while a nurse politely says she can't discuss your mother.

The privacy rules are often less strict than people think. In general, doctors and nurses *can* talk with family who are involved in someone's care, as long as the patient doesn't object. But a busy nurse who has never heard your voice, caring for a patient who is sedated or confused, will usually say nothing. A signed form already in the chart ends that problem before it starts.

	Authorization (release form)	**Health care power of attorney**
What it does	Lets you **hear** what's going on.	Lets you **decide** when your parent can't.
Where it comes from	Usually a one-page form from each doctor's office or pharmacy.	An elder law attorney. Not a form off the internet.
When to get it	Now, at the next visit.	Now, while your parent can take part fully.

Provider tracker

List every place that has your parent's health information. Track whether your form is on file.

Office / pharmacy	**Phone**	**Form on file? (Y/N)**	**Date signed**	**Who is listed**
Primary care				
Pharmacy				

Practice the phone call to the office

You only need one question. Say it out loud once before you call.

Sample script

"Hi, my name is _____. My mother (father), _____, is a patient there. I live out of state and help with her care. What form do you need on file so you can talk to me about her?"

Write the question in your own words:

Practice the talk with your parent

Your parent may worry that signing means giving up control. Say what it really does: it lets the office talk to you. It doesn't let you make choices for them.

Sample script

"Mom, if you're ever in the hospital, I don't want to be stuck on the phone with nobody allowed to tell me anything. This form just lets your doctor talk to me. You still make all your own decisions."

What worries do you think your parent will have about signing?

How will you answer those worries, in words that sound like you?

Scenario 1: The call from the hospital

It's 11 p.m. A neighbor calls to say your dad was taken to the hospital by ambulance. You call the hospital. The nurse says, "I'm sorry, I can't share any information." Your dad is confused and can't tell them it's okay.

What would you do tonight, in the next hour?

Who else could you call who might get information (a neighbor, his doctor's office in the morning, a sibling)?

What will you set up this month so this never happens again?

Scenario 2: "I don't need a lawyer"

You bring up a health care power of attorney. Your mom says, "I'm fine. I don't need a lawyer. You're making me feel old."

What would you say back? Write the actual words.

If she still says no, what smaller step could you ask for instead (like the one-page authorization form)?

Who else might your mom listen to about this (her doctor, a friend, a sibling)?

Part 3 Building Your Local Team

"Would you keep an eye on her?" is not a job. It's a favor with no edges — and favors with no edges fade in about three weeks.

A **job** is small and specific. It's something a neighbor can notice from her own front window. That's why she'll keep doing it.

Map your parent's people

Write the names of anyone who lives near your parent or sees them regularly. Think about neighbors, friends, church or club members, a hairdresser, a mail carrier, a pharmacist.

Name	How they know my parent	How often they see them	Phone

Who on this list is most likely to say yes to a small, specific ask? Why?

Write the job card

Fill in this card for your local person. Keep one copy. Give them one copy.

Job card for my local person

Name: _____ **Phone:** _____

Please text me if you notice:

- ☐ Mail piles up for two days
- ☐ Car hasn't moved in _____ days
- ☐ Lights are still off at _____ in the morning (please knock)
- ☐ Other: _____

Where the key is kept: _____

My phone: _____ **Backup person:** _____

Backup person's phone: _____

Sample script: the small ask

"Hi Carol, it's _____, Joan's daughter. Could I ask one small thing? If you ever see Mom's mail piling up for two days, would you text me? That's it. Here's my number."

Small asks get yeses. Big vague ones get "of course" — and then nothing.

Write your own ask for your local person:

_____

_____

_____

_____

If there's no neighbor to ask

There are still local eyes. Your parent's **Area Agency on Aging** can tell you about in-home help, meals, and transportation in their area. You can reach it through the Eldercare Locator at **1-800-677-1116**.

A **geriatric care manager** is a professional you can hire to be your eyes and your advocate locally. For many families at a distance, this is the most useful call they never knew to make.

Question to ask the Area Agency on Aging	Answer / notes
What in-home help is available where my parent lives?	
Are there meal programs? How do we sign up?	
What transportation options are there for doctor visits and errands?	
Can you point me to geriatric care managers in the area?	
Is there a waiting list for any of these?	

If you hired a care manager, what would you most want them to watch for or help with?

Scenario 3: The neighbor who went quiet

Six weeks ago, your mom's neighbor said, "Of course I'll keep an eye on her!" She texted twice the first week. You haven't heard from her since. You don't know if that means everything is fine or if she stopped looking.

What do you think went wrong?

How would you turn her "of course" into a small, specific job? Write the words.

How could you thank her or check in with her so she keeps going?

Scenario 4: Nobody close by

Your dad moved to a new town two years ago. He doesn't know his neighbors. His only friend there just moved to be near her own kids.

List three places or people you could contact to find local eyes for your dad.

Which one will you call first, and when?

What will you tell your dad about why you're doing this?

Part 4 Seeing More on Video Calls

A phone call tells you what your parent wants you to know. A video call tells you what they don't think to hide.

The trick is to stop looking at their face. Watch the things nobody thinks of as information:

- How many tries it takes to get up out of the chair.
- Whether they touch the furniture while crossing the room — the back of the couch, the counter edge, the doorframe.
- What's in the refrigerator — and whether there are three of the same thing.
- Whether today's compartment in the pill organizer is empty or full.

Give them a reason to walk

Don't ask, "How are you getting around?" Ask to see something. The tour is the check-in, and it never has to feel like one. Circle the ones you'll try, and add your own:

Ideas to get your parent walking on camera
"Show me the new curtains."
"What are you making for dinner? Show me."
"Can I see how the garden is doing out the window?"
"Show me that photo on the fridge you told me about."
"Did the package come? Can you show me?"
My idea:
My idea:
My idea:

Video call observation log

Fill in one row after each video call. Over time, the changes will show up in this log before they show up in conversation. Use short notes.

Date	Getting up from chair (# of tries)	Touching furniture to walk?	Fridge / food	Pill organizer (today's done?)	Other things I noticed

Make a step card for the screen

If the video device is new to your parent, write out every step on a card and tape it next to the screen. Nobody should have to remember five taps to see their grandchildren.

Use large, dark letters. One step per line. Use the words your parent would use ("the green button," not "accept").

HOW TO ANSWER A VIDEO CALL

Step 1: _____

Step 2: _____

Step 3: _____

Step 4: _____

Step 5: _____

Step 6: _____

If it doesn't work, call: _____

Scenario 5: Three tries to stand up

On a video call, you ask your mom to show you the new plant in the kitchen. It takes her three tries to get out of her chair. She holds the counter the whole way across the room. When you ask, she laughs and says, "Oh, I'm just stiff today."

What would you say in the moment? What would you *not* say?

What would you do in the next week?

Who could you ask to help you see more (her local person, her doctor, a care manager)?

How would you bring it up with her later, without making her feel watched?

Part 5 Keeping an Eye on Money

Handling money is one of the first everyday tasks to slip when something is changing — and it slips quietly. From far away, the bank statement is often the earliest clue you'll get.

Warning signs to watch for

Sign	Have I seen this?	When / notes
Late notices or overdue bills		
A bill paid twice		
A check with the wrong amount (an extra zero)		
A new "friend" on the phone who needs gift cards		
Unusual large withdrawals		
Stacks of unopened mail		
Other:		

Know your options — from lightest to biggest

Option	What it does	Before you do it
Account alert to your phone	You get a text for large withdrawals or a low balance.	Ask your parent. Ask the bank how to set it up.
View access (if the bank offers it)	You can see activity but can't move money.	Ask the bank what they offer.
Joint owner on the account	Much bigger change. Has legal, tax, and inheritance effects.	Talk to the bank **and** an elder law attorney first.

Practice asking for one alert

You don't need to take over your parent's money to keep an eye on it. Ask for one alert. Say the true reason.

Sample script

"If anyone ever tries to scam you, I'd like to know the same day you do."

How do you think your parent will react to this ask?

Write the ask in your own words:

If your parent says no, what will you say or do next?

Scenario 6: The gift card "friend"

Your dad mentions a nice young man who calls him every few days. "He's in a jam and I've been helping him out with some gift cards." Your dad sounds happy about it.

What would you say right now, on this call, without making him feel foolish?

Who would you contact next (his bank, a sibling, his local person)?

What would you set up so you hear about the next "friend" sooner?

Scenario 7: The bill paid twice

Your mom agreed to a low-balance alert. This month you got two alerts, and when you asked, she found she had paid the electric bill twice and the water bill not at all.

Is this a one-time mistake or a pattern? What would help you tell the difference?

What would you say to her? What would you ask her doctor about at the next visit?

What small change could make bill paying easier for her?

Money talks can be touchy in any family. What has made them hard in yours? What might make this one go better?

Part 6 Making Your Visit Count

You get one in-person look every few months. Holidays squeeze it even more — a full house, a lot of cooking, everyone on their best behavior. It's easy to fly home having seen everything and noticed nothing.

So decide ahead of time: **one hour of this visit is for looking.**

Before you go

My visit plan

Visit dates: _____ **Staying at:** _____

Doctor appointment booked for (date/time): _____

I told my parent I'd like to come along: Yes / Not yet _____

I asked my local person what they've noticed: Yes / Not yet _____

What my local person told me:

_____

_____

_____

Primary care appointments often book out several weeks. If you want an appointment during a holiday visit, call now.

My one hour of looking

Take this page with you. Write what you see, not what you think it means.

☐ **Open the refrigerator.** *Old food? Three of the same thing? Almost empty?*

☐ **Check the mail pile.** *Unopened bills? Late notices? Lots of "prize" letters?*

☐ **Walk from the bed to the bathroom with the lights off.** *Anything to trip on? Can you see the way?*

☐ **Look at the car.** *New scrapes or dents?*

☐ **Photograph every pill bottle label.** *New medicines? Old ones still around?*

☐ **Watch how your parent moves.** *Getting up, stairs, reaching, holding furniture?*

What surprised me most on this visit:

Medication list (from your photos)

Copy the information from the pill bottle photos. Bring this list to the doctor and pharmacy.

Medicine name	Dose / how often	Prescribed by	Pharmacy	Date on label

Going to the doctor together

Going with your parent once, in person, with a written list, is worth a dozen phone calls afterward. Fill this in before the appointment.

Changes I've noticed (from my log, my visit, or my local person):

Questions I want to ask the doctor:

Things my parent wants to ask about (ask them ahead of time):

What the doctor said / next steps:

The real conversation

Have any important talk on a quiet afternoon, one-on-one. Never at the dinner table with an audience.

What is the one thing you most need to talk about on this visit?

When and where will you have this talk (a walk, a drive, over coffee)?

How will you start? Write your first sentence.

What do you want your parent to feel when the talk is over?

Scenario 8: The holiday visit surprise

It's Thanksgiving. The house is full. While getting the milk, you find the fridge has four open jars of the same pickles, and a stack of unopened mail with two late notices. Your mom is laughing with the grandkids and seems like herself.

Would you bring it up today? Why or why not?

When would you talk to her about it, and how?

What would you want to check or ask about before you fly home?

Part 7 Should I Move Closer?

Sometimes, yes. If your parent's needs have grown past what neighbors, services, and a care manager can reliably cover — and you're the person best placed to fill the gap — moving can be the right call.

But here is the hard part. Moving doesn't turn one person into a care plan. The families who struggle most after a move are often the ones who moved out of guilt, became the only help, and a year later needed exactly the local support they could have set up from a distance.

Answer these honestly. No one else needs to see this page.

Would I be moving *toward* my parent, or *away* from my own work, marriage, or kids?

Is this decision coming from what my parent needs, or from guilt?

If I have siblings, is the quiet plan that I'll become the one person who does everything?

What would the local system need to cover for me to *not* move right now?

Sort it out: need or guilt?

List your reasons for moving in the left column. Then decide which kind of reason each one is.

My reason for moving	Comes from my parent's needs	Comes from guilt or worry	Could the local system handle it?

A rule worth keeping

Decide on a calm day, not in a hospital hallway. The hallway is the worst place to make a choice about the rest of your life. Build the system from where you are, and revisit the move if the system stops holding.

Scenario 9: The sibling who assumes

At a family video call, your brother says, "Well, you're the one without a mortgage, so it makes sense for you to move near Dad." Everyone goes quiet and looks at you.

What would you say in that moment?

What would a fair split of the work look like, even from far away? List jobs a sibling could do from anywhere.

How could you bring this up again later, on a calmer day, with everyone?

Part 8 Your Emergency Plan

Set aside enough money for one last-minute flight and a week near your parent. Keep it somewhere you won't touch it. Not because something is about to happen — but because it takes the worst part out of the phone call if it ever does.

Emergency travel budget

Cost	My estimate
Last-minute round-trip travel	
Lodging for one week	
Rental car or local rides	
Meals for one week	
Pet care, child care, or house-sitting at home	
Missed work (if unpaid)	
Other:	
TOTAL	

Where I will keep this money: _____

I'll have it saved by (date): _____ **Amount saved so far:** _____

If the call comes: my first-hour plan

Step	Who / what
Who I call first for information	
Who checks on my parent in person	
Who covers my work / home / kids	
Where my parent's paperwork is	
How I book travel fast	

Scenario 10: The call comes on a Tuesday

Your mom's local person texts: "Her lights were off at 10 and she didn't answer the door. I used the key. She fell in the hallway. The ambulance is here."

Using your plan from the last page, what do you do in the first hour?

What part of your plan is not ready yet? What will you do to fix it?

Who else needs to know about your plan before a day like this comes?

Scenario 11: "Everything's fine, honey"

Your dad always says he's doing great. But his local person mentions he hasn't been to his Tuesday card game in a month. On your next call, he says, "Oh, I just didn't feel like going."

What might be going on? List a few possibilities.

What would you do next — and who would you ask?

How could you help him get back to the things he enjoys, from far away?

Part 9 Your System on One Page

Pull it all together here. Make a copy for any sibling or helper who is part of the plan.

Part of the system	Who / what	How often
My local person and their job		
Backup local person		
Video call check-ins		
Money alert(s) set up		
Forms on file at doctors and pharmacy		
Health care power of attorney		
Area Agency on Aging / services		
Geriatric care manager		
In-person visits		
Emergency travel fund		
Siblings / family: who does what		

What part of my system feels weakest right now?

My check-in rhythm

A system only works if it keeps running. Decide how often you'll do each thing.

	What I'll do
Every week	
Every month	
Every few months	
Once a year	

When something changes, how will I know it's time to add more help?

What signs would tell me the system has stopped holding?

Part 10 Resources and Next Steps

Where to turn

These are the kinds of help most long-distance families use. Write down the local contact for each one.

Resource	What they help with	Local name / phone
Area Agency on Aging	Local info on in-home help, meals, transportation. Reach it through the Eldercare Locator: 1-800-677-1116.	
Geriatric care manager	A professional you hire to be your eyes and advocate near your parent.	
Elder law attorney	Health care power of attorney and questions about joint accounts.	
Your parent's bank	Account alerts, view access, and fraud concerns.	
Primary care office	Authorization forms, appointments, and questions about changes you notice.	
Your parent's pharmacy	Authorization forms and help with medication lists.	
Faith community or local clubs	People who see your parent regularly and may help.	
Meal and transportation programs	Often found through the Area Agency on Aging.	

For more on helping a parent from a distance — including local support options, paperwork, and emergency travel budgeting — visit The Aging In Place Directory Hub at AgingInPlaceDirectory.com.

Other local help I found

Name	What they do	Phone

Your next 30 days

Don't try to do it all at once. One step a week is enough to build a real system.

Week 1

- [ ] Call the primary care office and ask what form they need.
- [ ] Call one person near your parent and ask for one small job.

Notes: _____

Week 2

- [ ] On a video call, ask your parent to show you something in another room.
- [ ] Start your video call observation log.

Notes: _____

Week 3

- [ ] Ask your parent about one bank alert.
- [ ] Call the Area Agency on Aging (through the Eldercare Locator).

Notes: _____

Week 4

- [ ] Book a doctor's appointment for your next visit.
- [ ] Start your emergency travel fund.

Notes: _____

Remember
Distance changes the job. It doesn't take it away. Every small piece you put in place today means one less thing you'll find out last.

Notes

This workbook is for general information. It is not legal, medical, or financial advice. Talk with the right professional about your family's situation. © The Aging In Place Directory Hub. Esther C. Kane, CAPS, C.D.S..