



## INTERACTIVE GUIDE

# The Complete Home Healthcare Toolkit for Case Managers



### WHAT YOU'LL GET:

Guided checklist to assess physical, emotional, and financial care needs

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Customizable care plan template to turn insights into coordinated support

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Product selection matrix to match care goals with incontinence solutions

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Resources and state programs to connect patients with essential services

# INTRODUCTION

Every individual requiring home healthcare brings unique needs shaped by their condition, lifestyle, and personal preferences. Effective planning begins with context. For example:



**Samuel**

**AGE: 65**

Diagnosis:  
Spina Bifida

Care Challenge:  
Managing bladder and bowel function while navigating home spaces with limited mobility.



**Maria**

**AGE: 34**

Diagnosis:  
Multiple Sclerosis (MS)

Care Challenge:  
Progressive muscle weakness and inconsistent bladder control.



**Jayden**

**AGE: 8**

Diagnosis:  
Down Syndrome and/or Autism

Care Challenge:  
Nighttime continence support and anxiety around uncomfortable products.



**Malik**

**AGE: 17**

Diagnosis:  
Cerebral Palsy

Care Challenge:  
Limited mobility and muscle control affecting toileting and hygiene.

*As these examples show, continence care at home isn't one-size-fits-all. Each person needs a plan that reflects their unique circumstances, and that's where person-centered care comes in.*

## What's Person-Centered Care?

Person-centered care is an approach that prioritizes the individual's specific needs, preferences, and goals, placing them at the heart of every care decision. When someone cannot actively participate due to a medical condition or disability, their caregivers, legal representatives, or trusted supporters help guide the process, always honoring the person's values and best interests.

# PERFORMING A HOME HEALTHCARE NEEDS ASSESSMENT

You've downloaded the checklist—now it's time to make it your own. Use the interactive tool below to guide conversations with patients or caregivers. This checklist is a helpful starting point, but it's not exhaustive. Always ask additional questions based on the person's unique needs.

**For support, call us at 1-877-516-4582.**

## Physical

### Do you use any mobility assistance?

- ☐ No assistance needed
- ☐ Cane or walker
- ☐ Wheelchair or scooter
- ☐ Bed-bound or limited to transfers only
- ☐ Other:

### How often do you need help with the following? Select one per row.

- | NEVER                    | SOMETIMES                | ALWAYS                   |                                   |
|--------------------------|--------------------------|--------------------------|-----------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Bathing                           |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Dressing                          |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Toileting                         |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Eating                            |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Transferring (e.g., bed to chair) |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Other:                            |

### Do you need regular monitoring or support for any of the following?

- ☐ Diabetes
- ☐ Hypertension
- ☐ Dementia or Alzheimer's
- ☐ Respiratory conditions (e.g., COPD)
- ☐ Incontinence
- ☐ Recent surgery or wound care
- ☐ Seizures or neurological disorders
- ☐ Other:

### Do you need help getting to regular medical appointments?

- ☐ Yes
- ☐ No

### Is your current living environment:

- ☐ Clutter-free and easy to navigate?
- ☐ Equipped with grab bars or fall-prevention tools?
- ☐ Safe for using appliances and tools independently?

### Do you have any specific needs related to product sizing or fit?

- ☐ Standard sizing works well
- ☐ Petite or youth sizing preferred
- ☐ Bariatric or extended sizing needed
- ☐ Unsure or need help determining the right size

### Have you experienced a fall in the past year?

- ☐ Yes
- ☐ No

## Emotional

### How often do you feel the following?

NEVER	SOMETIMES	ALWAYS	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Lonely or socially isolated
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Anxious or depressed
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Forgetful or disoriented
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Confused during certain times of day (e.g., evening)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Overwhelmed or burned out
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Grieving a recent loss or life change
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other:

### Are you open to and interested in any of the following?

- ☐ Companionship services
- ☐ Mental health or behavioral support
- ☐ Cognitive stimulation activities
- ☐ Support groups (in-person or virtual)
- ☐ Grief or loss counseling
- ☐ Mindfulness or relaxation techniques
- ☐ Spiritual or pastoral care
- ☐ Other:

### Do you:

- ☐ Prepare your own meals regularly?
- ☐ Rely on meal delivery services (e.g., Meals on Wheels)?
- ☐ Skip meals due to difficulty cooking or accessing food?
- ☐ Other:

### Are you open to and interested in any of the following?

- ☐ Grocery delivery services
- ☐ Meal planning assistance
- ☐ Dietary guidance or nutritional counseling
- ☐ Other:

### Who helps you on a regular basis?

- ☐ Family member(s)
- ☐ Paid caregiver or aide
- ☐ Neighbor or friend
- ☐ No one regularly
- ☐ Other:

### Are you open to and interested in any of the following?

- ☐ Caregiver support services
- ☐ Respite care (temporary relief for caregivers)
- ☐ Care and service coordination assistance
- ☐ Other:

## Financial

**What type of health coverage do you currently have?**

- ☐ Medicaid
- ☐ Medicare
- ☐ Private insurance
- ☐ None / Unsure
- ☐ Other:

**Do financial concerns ever prevent you from seeing a doctor or filling a prescription?**

- ☐ Yes
- ☐ No

**Are you currently enrolled in or applying for any of the following?**

- ☐ SNAP (food assistance)
- ☐ SSI or SSDI (senior/disability)
- ☐ Housing or rental assistance (e.g., Section 8)
- ☐ Energy/utility assistance
- ☐ Other:

**Do you have a fixed monthly income?**

- ☐ Social Security
- ☐ Disability (SSDI or other)
- ☐ Retirement or pension income
- ☐ No regular income
- ☐ Other:

**Are you open to and interested in any of the following?**

- ☐ Understanding or managing medical bills
- ☐ Applying for benefit programs
- ☐ Financial or estate planning
- ☐ Connecting with a benefits counselor or social worker
- ☐ Other:

# CUSTOMIZING YOUR PATIENT'S CARE PLAN

Now that you have a complete understanding of your patient's **physical, emotional, and financial** needs, it's time to build a personalized care plan. Use the customizable template below to organize key insights and begin coordinating support.

## Client Information

NAME				
DATE OF BIRTH				
GENDER / PREFERRED PRONOUNS				
PRIMARY LANGUAGE				
MEDICAL HISTORY SNAPSHOT <small>(key diagnoses, surgeries, hospitalizations)</small>				
EMERGENCY CONTACT	Name	Relationship	Phone	Email
INSURANCE COVERAGE				

## Preliminary Assessment Summary

CURRENT CONDITIONS / DIAGNOSES	
PHYSICAL NEEDS <small>(incontinence, mobility limitations, chronic pain)</small>	
EMOTIONAL NEEDS <small>(anxiety, isolation, mood disorders)</small>	
COGNITIVE / COMMUNICATION NEEDS <small>(memory loss, speech challenges)</small>	
SOCIAL CONSIDERATIONS <small>(caregiver support, living situation)</small>	
FINANCIAL FACTORS <small>(income level, benefits eligibility)</small>	

## Interventions, Products, or Services – with examples!

<b>CARE GOALS</b> <i>reduce nighttime accidents, mental health support, independent mobility</i>	<b>PLANNED SOLUTIONS OR SUPPORT</b> <i>in-home PT 2x weekly, meal delivery, bladder management education</i>	<b>RESPONSIBLE PARTIES</b> <i>patient, physical therapist, case manager</i>	<b>TIMELINE / FREQUENCY:</b> <i>plan start date, initial review date, check-in, reassessment</i>

# ALIGNING INCONTINENCE PRODUCTS WITH CARE GOALS

The matrix below helps connect common care goals with recommended product types and briefly explains why each product may be a good fit.

CARE GOAL	RECOMMENDED PRODUCT(S)	WHY THIS WORKS
Maintain independence and dignity	<b>Pads or Guards</b>	Discreet, lightweight, easy to manage without assistance. Great for active individuals with light leakage.
Balance mobility and protection	<b>Pad &amp; Pant Systems</b> <b>Protective Underwear</b>	Offers moderate coverage while allowing for freedom of movement—ideal for mobile individuals who need extra security.
Ensure all-day protection for moderate needs	<b>Undergarments</b>	Belted or beltless options provide flexible, secure fit throughout the day; helpful for those with variable care routines.
Overnight comfort and leakage prevention	<b>Briefs</b>	High absorbency and secure tabs reduce leakage during long periods of immobility.
Support caregivers with ease of use	<b>Protective Underwear</b> <b>Briefs</b>	Easy to change and adjust, especially for bed-bound individuals or those requiring frequent assistance.

Some products may not be top of mind, but they can make a big difference in comfort, protection, and care efficiency.

**Booster Pads:** Enhance the absorbency of existing products without adding bulk. Ideal for overnight use or extended wear when extra protection is needed.

**Light Barrier Cream:** Protects skin from irritation and breakdown caused by moisture. A simple way to support skin health and comfort.

**Bowel Underpads:** Specifically designed for bowel incontinence, offering enhanced containment, odor control, and surface protection.

**Overnight Briefs or Underwear:** Provide maximum absorbency and leak protection for long periods of immobility, promoting restful sleep and confidence overnight.

## Need Help Choosing the Right Product or Brand?

Explore our full Product Catalog, or get personalized guidance from our team. Call 1-877-516-4582 or email [sales@choosepmf.com](mailto:sales@choosepmf.com)—we're here to help.

# ADDITIONAL RESOURCES

Looking for more support? Explore the trusted programs and services below. Have questions? Call us at 1-877-516-4582 for personalized guidance from our team.

## Aging & Disability Resources

[Eldercare Locator](#): Connects older adults and caregivers with local services for meals, personal care, housing, and transportation.

[ILRU CIL Directory](#): Search for CILs offering peer support, advocacy, and help with home accessibility.

## Nutrition & Daily Living

[Meals on Wheels America](#): Delivers meals and conducts well-being checks for seniors and people with limited mobility.

[SNAP](#): Provides monthly grocery benefits based on income and household size.

## Transportation

[NEMT](#): Free or low-cost rides to medical appointments, often covered by Medicaid.

[Paratransit & ADA-Accessible Transit](#): Curb-to-curb rides for individuals who can't use standard public transit.

[Uber Health](#) & [Lyft Healthcare](#): Ride services arranged by providers to support safe, reliable transportation to appointments.

## Financial & Legal Assistance

[SSDI / SSI](#): Monthly income for people with disabilities or limited income through federal benefits.

[Medicaid / Medicare Assistance](#): Helps with healthcare coverage, long-term care, and home-based services.

[Legal Services Corporation Directory](#): Free legal aid for advance directives, benefits, housing, and guardianship.

## Medical & Mental Health Support

[NIH Clinical Trials Finder](#): Search for clinical trials offering new treatments for chronic or rare conditions.

[National Suicide & Crisis Lifeline](#): 24/7 free and confidential support for mental health emergencies. Call or text 988.

[SAMHSA Treatment Locator](#): Find local services for mental health and substance use treatment.

## Further Education

[Attends Resource Center](#): Tips, articles, and updates on continence care and caregiving.

[Medline University](#): Free CEU courses on incontinence, skin care, and patient communication.

[Family Caregiver Alliance](#): Trainings, toolkits, and state-specific resources for family caregivers.

## Appropriate Services by State

[Alabama: Alabama Department of Senior Services](#)

[Alaska: Alaska Division of Senior & Disabilities Services](#)

[Arizona: Arizona Division of Developmental Disabilities](#)

[Arkansas: Arkansas Division of Developmental Disabilities Services](#)

[California: California Department of Developmental Services](#)

[Colorado: Colorado Office of Community Living](#)

[Connecticut: Connecticut Department of Developmental Services](#)

[Delaware: Delaware Division of Developmental Disabilities Services](#)

[Florida: Florida Agency for Persons with Disabilities](#)

[Georgia: Georgia Developmental Disabilities Services](#)



[Hawaii: Hawaii Developmental Disabilities Division](#)

[Idaho: Idaho Developmental Disabilities Program](#)

[Illinois: Illinois Division of Developmental Disabilities](#)

[Indiana: Indiana Division of Disability and Rehabilitative Services](#)

[Iowa: Iowa Health & Human Services](#)

[Kansas: Kansas Department for Aging & Disability Services](#)

[Kentucky: Team Kentucky Health & Family Services](#)

[Louisiana: Louisiana Department of Health](#)

[Maine: Maine Office of Aging & Disability Services](#)

[Maryland: Maryland Developmental Disabilities Administration](#)

[Massachusetts: Massachusetts Department of Developmental Services](#)

[Michigan: Michigan Aging & Adult Services Agency](#)

[Minnesota: Minnesota Disability Services Division](#)

[Mississippi: Mississippi Division of Aging & Adult Services](#)

[Missouri: Missouri Division of Developmental Disabilities](#)

[Montana: Montana Department of Public Health & Human Services](#)

[Nebraska: Nebraska Developmental Disabilities Services](#)

[Nevada: Nevada Aging & Disability Services Division](#)

[New Hampshire: New Hampshire Bureau of Developmental Services](#)

[New Jersey: New Jersey Division of Developmental Disabilities](#)

[New Mexico: New Mexico Developmental Disabilities Supports Division](#)

[New York: New York Office for People With Developmental Disabilities](#)

[North Carolina: North Carolina Department of Health & Human Services](#)

[North Dakota: North Dakota Health & Human Services](#)

[Ohio: Ohio Department of Developmental Disabilities](#)

[Oklahoma: Oklahoma Human Services](#)

[Oregon: Oregon Office of Developmental Disabilities Services](#)

[Pennsylvania: Pennsylvania Office of Human Services](#)

[Rhode Island: Rhode Island Developmental Disabilities Services](#)

[South Carolina: South Carolina Department of Health & Human Services](#)

[South Dakota: South Dakota Division of Developmental Disabilities](#)

[Tennessee: Tennessee Department of Disability & Aging](#)

[Texas: Texas Health & Human Services](#)

[Utah: Utah Division of Services for People with Disabilities](#)

[Vermont: Vermont Disabilities Aging & Independent Living](#)

[Virginia: Virginia Developmental Services](#)

[Washington: Washington Developmental Disabilities Administration](#)

[West Virginia: West Virginia Department of Health](#)

[Wisconsin: Wisconsin Department of Health Services](#)

[Wyoming: Wyoming Developmental Disabilities Division](#)

# PUT PEOPLE FIRST. WE'LL HANDLE THE DETAILS.

Effective home healthcare starts with person-centered care—planning that honors individual needs, values, and goals. This Guide helps case managers do just that: assess needs holistically, build personalized care plans, and match the right products and services to each situation.

**HDIS is a trusted partner in home healthcare products. While premium products are important, expert, compassionate guidance is at the heart of what we do. HDIS helps AAAs choose the right products, meet eligibility requirements, stay under budget, and ensure seamless delivery from case manager to end recipient.**

## HERE'S WHAT YOU CAN DO TODAY:

- Use the needs assessment checklist to guide meaningful conversations
- Turn insights into action with the customizable care plan template
- Match care goals to the right products using the product matrix



## NEED ADDITIONAL SUPPORT?

Call, email, or scan the QR code to book a meeting today, and we'll host a free lunch-and-learn for your team!



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