ANCHOR™ FAMILY CLARITY SESSION

Pre-Session Preparation Worksheet

This worksheet is for your private preparation. You do not need to submit detailed medical information through this page or through Calendly. Keep your notes with you and have them available during your Family Clarity Session.

PRIVATE FAMILY PREPARATION
Keep your notes with you. Do not upload detailed health information through this webpage or Calendly.

Before You Begin

The goal is not to diagnose your parent. The goal is to describe what you have noticed clearly enough that we can organize the situation and identify the next wise move.

Describe—Do Not Diagnose.

1. What Brought You Here?

What is your primary concern right now?

What happened recently that made you decide to seek help now?

2. What Have You Noticed Changing?

Write down the specific changes you have observed. Focus on what happened, when it happened, and whether it has happened more than once.

OBSERVATIONS & PATTERNS

3. Pattern Direction

For the concern that brought you here, does it seem:

- ☐ Better
- ☐ Same
- ☐ Worse
- ☐ Unsure

What leads you to that impression?

4. Areas That May Be Involved

Mark any areas you may want to discuss:

- ☐ Memory / thinking
- ☐ Medication management
- ☐ Mobility or falls
- ☐ Family disagreement
- ☐ Benefits / resources

Other areas or concerns:

The webpage also lists additional areas in this section. Use the open lines to capture any topic important to your family.

EVENTS, PEOPLE & FAMILY

5. Recent Events

Have there been any recent falls, hospital visits, moves, losses, driving incidents, caregiver changes, or other events that may help explain why the situation feels different?

6. Who Is Already Involved?

Think about the professionals or services already helping your family, such as a primary-care clinician, specialist, pharmacist, therapist, home-care agency, social worker, attorney, financial professional, or community aging service.

7. Family Involvement

Who is most involved in decisions or caregiving?

Do family members generally agree about what is happening? If not, where is the disagreement?

ACTIONS & SAFETY

8. What Have You Already Tried?

What conversations, appointments, resources, or actions have already occurred?

9. Safety

Is there an immediate threat to your parent’s or another person’s safety?

Important: If someone is in immediate danger or experiencing a medical emergency, do not wait for an ANCHOR™ consultation. Contact 911 or the appropriate emergency or licensed professional service.

YOUR NEXT WISE MOVE

10. Your Most Important Question

At the end of our conversation, what would you most like to understand more clearly?

11. Optional Materials to Have Nearby

If relevant and easily available, you may want to have a current medication list, recent discharge instructions, provider list, your ANCHOR™ Pattern Tracking notes, or dates/details of recent incidents nearby during the consultation.

Do not upload or send these materials through Calendly.

Remember

You do not need to solve everything before the session. Bring your observations, your questions, and what you know so far.

We will work toward the next wise move together.

Additional notes or questions

Prepared for the ANCHOR™ Family Clarity Session. Reference: drwaltkasmir.com/anchor-family-clarity-preparation/