

Petalz Mosaic Care Decision Checklist



Use this worksheet to compare what is happening now, who owns each next step, and whether a lighter shared-care plan or a more structured care pod is the better fit.

PERSON WE ARE PLANNING AROUND

DATE

MAIN CONTACT

REVIEW AGAIN ON

1. Priority Scan

Circle a priority, then write the owner and next step before the conversation ends.

CARE AREA	WHAT IS HAPPENING RIGHT NOW?	PRIORITY	OWNER / BACKUP	NEXT USEFUL STEP	BY WHEN
Daily routine Meals, errands, appointments, check-ins.		☐ Low ☐ Med ☐ High			
Communication Who knows what, and how fast updates travel.		☐ Low ☐ Med ☐ High			
Shared tasks Rides, groceries, calls, forms, home help.		☐ Low ☐ Med ☐ High			
Safety signals Missed meds, falls, confusion, isolation, urgent calls.		☐ Low ☐ Med ☐ High			
Family load Burnout, distance, unclear expectations, hard handoffs.		☐ Low ☐ Med ☐ High			

2. Ownership Planner

Name the lead, backup, and handoff details for each recurring need.

NEED OR RECURRING TASK	WHAT GOOD LOOKS LIKE	PRIMARY OWNER	BACKUP / ESCALATION	HANDOFF NOTES	REVIEW
Appointments Scheduling, rides, reminders, follow-up notes.					
Meals and supplies Groceries, delivery, dietary preferences, household basics.					
Daily check-ins Morning/evening calls, missed check-in response.					
Paperwork Forms, bills, insurance, benefits, shared document access.					
Social connection Family calls, visits, celebrations, loneliness signals.					
Unexpected help Who responds when something changes quickly.					

3. Decision Fit

Use this to decide whether to stay light, coordinate the family, or add more structure.

SIGNAL	STAY LIGHT FOR NOW	SHARED CARE CALENDAR MAY HELP	CARE POD MAY HELP
Tasks	Mostly predictable, one person can handle them.	Several relatives or helpers need shared visibility.	Tasks are frequent, time-sensitive, or easy to miss.
Updates	People are already informed without extra effort.	Updates are scattered across texts, calls, and memory.	Missed updates create stress, risk, or duplicated work.
Ownership	Everyone knows who owns what.	Ownership needs to be visible and easy to hand off.	Backup coverage and escalation paths need structure.
Senior experience	The current setup feels calm and respectful.	More connection would help without adding pressure.	Support needs to feel coordinated, steady, and less reactive.

What the person being supported wants

Decision and next three actions

☐ Stay light ☐ Try Shared Care Calendar ☐ Explore Care Pod

Keep this worksheet focused on coordination, consent, and practical support. Avoid writing sensitive medical details unless the family has a clear reason and a secure place to store them.