



Family  
Caregiver  
Alliance®

# 5 Tips for Writing a Personal Care Agreement

**When an ailing relative** needs help, family often steps in to provide care. A personal care agreement offers financial security to family caregivers and peace of mind for all. Following are five considerations when writing a personal care agreement.



## Determine the level of care

Consult with a homecare agency, physician, social worker, or other care professional to determine current and future care needs.

## Make it a family agreement

The plan should be discussed among family to resolve concerns before an agreement is drafted. One person should facilitate — some families hire outside mediators.



## Clearly state responsibilities

A caregiver's tasks should be clearly stated. The phrase "or similar to be mutually agreed upon by the parties" allows for flexibility.

**Plan for time out** Consider an "escape clause" in case one of the parties wants to terminate the contract, and a plan if the caregiver becomes ill or wants time off.



## Check eligibility for Medicaid

Check your state for Medicaid rules since regulations vary. You may want to consult an elder law attorney for help qualifying for Medicaid (Medi-Cal in California).

**Want to Learn More?** Find more in our **Personal Care Agreements** fact sheet at [caregiver.org/resource/personal-care-agreements](https://caregiver.org/resource/personal-care-agreements).

