

Ageless & Independent

Interactive Workbook

Your Personal Home Safety & Independence Planning System

Created by William Raphael, 64

Engineered from lived experience. Backed by occupational therapy principles. Tested in real homes.

Ageless and Independent: Interactive Workbook

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How to Use This Workbook

Format	Best For	Access
Fillable PDF	Printing, handwriting, offline	Download → Open in Adobe Reader (free) → Type directly
Notion Template	Digital, sync across devices, share with family	Duplicate to your Notion
Google Sheets	Data tracking, formulas, collaboration	Make a copy

Recommended workflow: 1. **Week 1:** Complete all Assessments (Sections 1–5) — one per day with email course 2. **Week 2–4:** Execute 30-Day Plan (Section 6) — track in Pain Pattern Log (Section 7) 3. **Month 2–3:** Advance to 60/90-Day Plans — revisit assessments quarterly 4. **Ongoing:** Quarterly reassessment + family check-in (Section 8)



SECTION 1: HOME SAFETY SELF-ASSESSMENT (Day 1)

Time: 15 min | Frequency: Quarterly

Part A: Fall Risk Hotspots

Rate each area 1–5 (1 = safe, 5 = hazard). Photo each 3+ zone.

Area	Risk (1–5)	Specific Hazards Noted	Photo?	Priority (H/M/L)
Entry/Exterior				
Front steps/threshold				
Lighting at door				
Pathway condition				
Package/bench area				
Stairs (each run)				
Handrails (both sides?)				
Tread contrast/depth				
Lighting switches top/bottom				
Clutter on stairs				
Bathroom(s)				
Tub/shower entry				
Grab bars (mounted?)				
Toilet height/transfer				
Floor slip resistance				
Lighting/nightlight				
Kitchen				
Reach zones (Golden Zone?)				
Floor mat/fatigue				
Appliance accessibility				
Lighting task areas				
Bedroom				
Bed height/transfer				
Path to bathroom (lit?)				
Phone/charger reach				
Closet access				

Area	Risk (1–5)	Specific Hazards Noted	Photo?	Priority (H/M/L)
Living Areas				
Pathway width (36"+?)				
Rug security				
Furniture stability				
Light switches at entries				

Part B: Daily Task Friction Audit

For each task: Rate difficulty 1–5. Note body part stressed. Time how long it takes.

Task	Difficulty (1–5)	Body Part	Time	Adaptation Used?	Fix Idea
Showering/bathing					
Toilet transfer					
Dressing (lower body)					
Meal prep (standing)					
Reaching overhead					
Bending to floor					
Carrying laundry					
Taking trash out					
Getting mail					
Opening jars/containers					

Part C: Emergency Preparedness Checklist

- ☐ Phone at bedside + living area + bathroom
- ☐ Emergency contacts posted (fridge, phone, wallet)
- ☐ Medication list current (doses, prescribers, pharmacy)
- ☐ Medical conditions/allergies documented
- ☐ DNR/POLST/Advance directive location known
- ☐ Key holder (neighbor/family/lockbox) identified
- ☐ Fall detection/medical alert system active
- ☐ Power outage plan (lights, phone charge, meds cold)
- ☐ Fire escape route practiced (2 exits/room)



SECTION 2: BATHROOM AUDIT & UPGRADE LADDER (Day 2)

Time: 20 min | Frequency: After changes / annually

Current State Documentation

Fixture	Type	Height	Condition	Grab Bar?	Notes
Tub					
Shower					
Toilet					
Vanity/sink					
Flooring					
Lighting					
Ventilation					

Upgrade Ladder Decision Matrix

Check your chosen level per zone. Budget column = your max for that zone.

Zone	\$0 (Today)	\$50 (Week)	\$200 (Month)	\$500+ (Reno)	My Choice	Budget
Tub/Shower Entry	☐ Non-slip strips ☐ Remove soap dish ☐ Declutter	☐ Suction grab bar (2) ☐ Transfer bench ☐ Handheld shower	☐ Bolted grab bars ☐ Curbless insert ☐ Built-in bench	☐ Walk-in shower ☐ Linear drain ☐ Heated floor		\$
Toilet	☐ Clear path ☐ Nightlight	☐ Raised seat (clip) ☐ Toilet frame	☐ Comfort-height ☐ Bolted grab bar	☐ Wall-hung ☐ Bidet seat		\$
Floor	☐ Microfiber mat ☐ Remove rugs	☐ Heated mat ☐ Better drainage	☐ Anti-slip coating ☐ Floor-level drain	☐ Wet room ☐ Heated floor		\$

Zone	\$0 (Today)	\$50 (Week)	\$200 (Month)	\$500+ (Reno)	My Choice	Budget
Reach/Storage	☐ Caddy at chest ☐ Declutter	☐ Pull-down shelf ☐ Suction shelves	☐ Recessed niche ☐ Pull-out vanity	☐ Custom vanity ☐ Universal design		\$

Renter-Friendly Column ☒

All \$0–\$50 items: No tools, no damage, take with you.

 SECTION 3: KITCHEN & LIVING — GOLDEN ZONE MAPPER (Day 3)

Time: 30 min | Frequency: After reorganization / annually

Golden Zone Inventory

Rule: Weekly-use items between shoulders and hips.

Cabinet/Drawer	Current Contents	In Golden Zone?	Relocate To	Action Date
Upper 1 (L of stove)		☐ Y ☐ N		
Upper 2 (R of stove)		☐ Y ☐ N		
Upper 3 (fridge side)		☐ Y ☐ N		
Lower 1 (sink base)		☐ Y ☐ N		
Lower 2 (pot drawer)		☐ Y ☐ N		
Pantry shelf 1		☐ Y ☐ N		
Pantry shelf 2		☐ Y ☐ N		
Countertop		☐ Y ☐ N		

Chair & Seating Audit

Seat	Height	Firmness	Arms?	Depth	Pass Test?	Replace?
Kitchen chair 1					☐ Y ☐ N	☐ Y ☐ N

Seat	Height	Firmness	Arms?	Depth	Pass Test?	Replace?
Kitchen chair 2					☐ Y ☐ N	☐ Y ☐ N
Living room chair					☐ Y ☐ N	☐ Y ☐ N
Sofa					☐ Y ☐ N	☐ Y ☐ N
Desk chair					☐ Y ☐ N	☐ Y ☐ N
Bedside					☐ Y ☐ N	☐ Y ☐ N

Test: Sit → Stand without hands. Knees at 90°. Feet flat. No rocking.

Living Room Hazard Map

Walk path: Bedroom → Bathroom → Kitchen → Living → Entry - [] 36" clear width throughout - []
No loose rugs / all secured - [] No cords across paths - [] Light switch at each room entry - []
Nightlights on path (red spectrum) - [] Phone/charger at seat level - [] Remote/glasses in Golden
Zone - [] Stable furniture (no wobble)

 SECTION 4: STAIRS, ENTRYWAYS & NIGHT NAVIGATION (Day 4)

Time: 20 min | Frequency: Quarterly

Stair Audit (Per Run)

Stair Run	# Steps	Rails (L/R/Both/None)	Tread Depth	Contrast Strips?	Lighting Top/Bottom	Clutter?	Grade (A–F)
Main (entry)							
Basement							
Second floor							
Exterior							

Action: Any run < B grade = immediate 3-point contact enforcement + upgrades.

[illegible]

Path Segment	Light Type	Color	Motion Sensor?	Battery Backup?	Tested Dark?
Bed → Bath					☐ Y ☐ N
Bed → Kitchen					☐ Y ☐ N
Living → Bath					☐ Y ☐ N
Entry → Living					☐ Y ☐ N

[illegible]

Date	Time	Activity	Pain (1–10)	Location	Duration	Trigger?	Relief?	Mood (1–5)	Sleep (hrs)

Pattern Analysis (After 14 Days)

Top 3 Triggers Identified: 1. _____ 2. _____ 3. _____

Top 3 Relief Strategies: 1. _____ 2. _____ 3. _____

Correlations Noticed: - Time of day: _____ - *Weather*: _____ - Activity duration threshold: _____ - Sleep quality link: _____ - Stress/emotion link: _____

Weekly Maintenance Log (Post-Baseline)

Week	Avg Pain	Flare Count	New Triggers?	Adaptations Working?	Plan Adjustments
1					
2					
3					
4					

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SECTION 6: 30/60/90-DAY UPGRADE PLAN (Day 5 → Execution)

30-Day Sprint: High Risk / Low Cost / High Impact

Task	Zone	Cost	Difficulty (1–5)	Assigned To	Target Date	Done?	Notes
Suction grab bars (2)	Bath	\$25	1	Me		☐	
Contrast stair strips	Stairs	\$12	1	Me		☐	
Motion sensor lights (4)	Hall/Bath	\$40	2	Me		☐	
Golden Zone reorg	Kitchen	\$0	2	Me		☐	

Task	Zone	Cost	Difficulty (1–5)	Assigned To	Target Date	Done?	Notes
Pain Tracker: 14 days	Body	\$0	1	Me		☐	
Emergency sheet on fridge	Safety	\$0	1	Me		☐	
Lever handle (1 test)	Door	\$15	2	Me		☐	
Family conversation	Family	\$0	3	Me		☐	

30-Day Success Metrics: - [] Zero near-falls this month - [] Pain Tracker: 14/14 days complete - [] Top 3 risk zones: mitigated - [] Family conversation: scheduled - [] Confidence rating (1–10): ____ → ____

60-Day Build: Medium Investment / Structural

Task	Zone	Est. Cost	Pro Needed?	Quote Source	Target Date	Done?
Bolted grab bars (replace suction)	Bath	\$150–300	☐ Y ☐ N			☐
Comfort-height toilet	Bath	\$200–400	☐ Y ☐ N			☐
Anti-fatigue mats (3 zones)	Kit/Laundry	\$120	☐ N			☐
All lever handles	Whole	\$150–300	☐ Y ☐ N			☐
Smart lights (voice)	Main	\$200	☐ N			☐
Video doorbell	Entry	\$100–200	☐ N			☐
Stove auto-shutoff	Kitchen	\$50–150	☐ N			☐

90-Day Future-Proof: Major / Planning

Task	Zone	Est. Cost	Research Done?	Pro Consult?	Decision Date
Walk-in shower / curbless	Bath	\$3,000–15,000	☐ Y ☐ N	☐ Y ☐ N	
Stairlift assessment	Stairs	\$3,000–8,000	☐ Y ☐ N	☐ Y ☐ N	

Task	Zone	Est. Cost	Research Done?	Pro Consult?	Decision Date
First-floor primary suite	Whole	\$20,000+	☐ Y ☐ N	☐ Y ☐ N	
LTC insurance review	Finance	Varies	☐ Y ☐ N	☐ Y ☐ N	
Medicaid planning consult	Finance	\$500–2,000	☐ Y ☐ N	☐ Y ☐ N	
Legal docs update	Legal	\$500–1,500	☐ Y ☐ N	☐ Y ☐ N	



SECTION 7: FAMILY CONVERSATION TOOLKIT

Conversation Planner

Who: _____ **When:** _____ **Where:** _____ **Format:** ☐ In-person ☐ Video call ☐ Phone

Talking Points Script

"I've been working on a home safety plan. I've assessed the house, found some things to fix, and made a 90-day roadmap. I'd love to walk you through it — partly so you know what I'm doing, partly because your help on a few things would be great. No pressure — just want you in the loop."

Specific Asks (Check What Applies)

- ☐ Help installing grab bars / rail (date: _____)
- ☐ Research contractors for __ **(budget: \$_____)**
- ☐ Accompany to PT/OT eval (date: _____)
- ☐ Review LTC insurance options together
- ☐ Help digitize medical records/emergency info
- ☐ Quarterly check-in call (schedule: _____)
- ☐ Emergency contact / key holder
- ☐ Other: _____

Boundaries to State Clearly

- "I'm leading this. Your support is welcome; takeover is not."
- "I'll ask for help when I need it. Please don't assume."
- "My home, my decisions. I'll keep you informed."

- "This is about staying independent longer — for all of us."

Follow-Up Email Template

Subject: Our conversation / Next steps

Thanks for talking yesterday. Here's what I'm tackling first: 1. ____ (your help: __) 2. (your help: __) 3. (your help: ____)

I'll update you in 2 weeks. Love you / appreciate you.

SECTION 8: QUARTERLY REASSESSMENT PROTOCOL

Quarterly Review Checklist (Schedule: Jan / Apr / Jul / Oct)

- ☐ Retake Home Safety Self-Assessment (Section 1)
- ☐ Compare photos: what changed?
- ☐ Review Pain Pattern Tracker trends
- ☐ Check 30/60/90 plan progress
- ☐ Test all safety devices (grab bars, lights, alerts)
- ☐ Medication review with pharmacist/doctor
- ☐ Vision/hearing check due?
- ☐ Family check-in call completed
- ☐ Emergency info updated
- ☐ Budget review for next quarter upgrades

Annual Deep Dive (Birthday Month)

- ☐ Full occupational therapy home eval (insurance often covers)
- ☐ Contractor walk-through for major items
- ☐ Legal/financial document review
- ☐ Long-term housing plan discussion
- ☐ Community resources audit (senior center, transit, meals)
- ☐ Update this workbook — archive old version, start fresh

SECTION 9: RESOURCE DIRECTORY

William's Tested Product Picks (As of 2026)

No affiliate links. These are what I use.

Category	Product	Approx. Cost	Where to Buy	Why William Picks It
Grab Bar (Suction)	Vive Suction Grab Bar 12"	\$18	Amazon	Holds 300 lbs, visual indicator, tool-free
Grab Bar (Bolted)	Moen Home Care SecureMount	\$45	Home Depot	Anchors to studs through tile, stylish finishes
Transfer Bench	Drive Medical Premium	\$85	Amazon	Tool-free adjust, backrest, non-slip feet
Raised Toilet Seat	Carex Quick-Lock 4"	\$35	Walmart	Locks on, padded arms, 300 lb capacity
Reacher	RMS 32" Trigger Grip	\$18	Amazon	Magnetic tip, rotates 90°, lightweight
Motion Lights	Lepower 3-Pack Battery LED	\$25	Amazon	Warm/cool/red modes, magnetic mount, 1yr battery
Stair Strips	GripTape Non-Slip Treads	\$15	Home Depot	Pre-cut, glow-in-dark option, outdoor rated
Anti-Fatigue Mat	Kangaroo 3/4" Kitchen Mat	\$40	Amazon	Beveled edges, waterproof, 10-yr warranty
Lever Handles	Schlage Hall/Closet Lever	\$25	Lowe's	ADA compliant, reversible, lifetime mechanical
Medical Alert	Bay Alarm Medical SOS	\$25/mo	Direct	No contract, fall detection, GPS, spouse free
Smart Plug (Stove)	iGuardStove Auto Shutoff	\$395	Direct	Motion sensor, app alerts, gas/electric
Video Doorbell	Ring Battery Doorbell Plus	\$180	Amazon	1536p, head-to-toe view, quick replies

Professional Finder

- **Occupational Therapist (Home Eval):** [AOTA Find a Practitioner](#) — Search "home modification"
- **CAPS Contractor (Certified Aging-in-Place Specialist):** [NAHB CAPS Directory](#)

- **Elder Law Attorney:** [NAELA](#) — Medicaid planning, docs
- **Geriatric Care Manager:** [ALCA](#) — Care coordination

Financial Resources

- **Area Agency on Aging:** [Eldercare Locator](#) — Local programs, grants, services
- **State Fall Prevention Programs:** Many states offer free home assessments
- **VA Benefits (if applicable):** [VA Home Improvements](#) — HISA grant up to \$6,800
- **USDA Rural Repair:** [Section 504](#) — Loans/grants for 62+ rural homeowners



SECTION 10: NOTES & PERSONALIZATION

My "Why" Statement

Write this. Read it when motivation dips.

My Non-Negotiables

What I refuse to lose. What I'm protecting.

1.

2.

3.

My Team

Role	Name	Phone	Email	Notes
Primary Care				

Role	Name	Phone	Email	Notes
PT/OT				
Contractor				
Elder Law Atty				
Financial Advisor				
Emergency Contact 1				
Emergency Contact 2				
Key Holder				

Pharmacy & Medical

- Pharmacy: _____ Phone: _____
- Insurance: _____ Policy: _____
- Allergies: _____
- Blood Type: _____ Organ Donor: ☐ Y ☐ N



WORKBOOK VERSION & UPDATES

Version	Date	Changes	Next Review
1.0	---	Initial setup	---
1.1	---		---
1.2	---		---

Masterclass Members: Get updated versions automatically in your portal.

This workbook is your living document. Write in it. Cross things out. Make it messy. Make it yours.

— **William**

