FIRST ENTRY INTO YOUR
"Age-Tech Plan"

Category: "Aging-in-Place"

Tool: EVERPLANS

Everplans Modules:
"HOME AND PROPERTY"
&
"HOME OPERATING SYSTEM"

STEP BY STEP INSTRUCTIONS

EVERPLANS - THREE WAYS TO ACCESS THE TOOL: Digital, Non-Digital, & Hybrid

DIGITAL OPTION (for those comfortable creating and storing personal information online with the option of using an App)

The Digital Option of Everplans is the easiest and fastest way to catalog and share the information about running your home. The online prompts in the "Home and Property" module of Everplans facilitate making lots of progress quickly. However, there is no digital interface for the Everplans "Home Operating System" module which catalogs the additional critical information about running your home that most likely only you know. It is created offline by hand or using Word on your personal computer.

What follows are the step-by-step instructions to access Everplans "Home and Property" and "Home Operating System" modules using the Digital Option.

Step 1 Digital Option: Complete "Home and Property" module:

- Login to Everplans
- Select "Home and Property"

- Select "Add another" next to "Homes"
- Complete the six sections: "Basic Info", "Ownership", "Insurance", "Utilities", "Vendors & Services" and "Security"
  Tip: Add to the "Notes" field in each section how each bill is paid, approximate amount of bill and day of the month the bill is due. Include real estate and personal property tax bills as well.

Step 2 Digital Option: Complete "Home Operating System" module

Without having to login to Everplans, you can find the information needed to create the "Home Operating System" by making the following selections:

- Go to the <u>Everplans</u> website
- Select "Organize your life" tab in the top menu bar of the Home page
- Find "Digital Organization" list
- Select "Everplans Blueprint" located at the bottom of the list
- Scroll to pages 5 and 6 to find the seven tasks that create the six-part "Home Operating System"
- Either print out the seven tasks or reference them from your computer: "Common Areas", "Security and Automation", "Basement", "Main Floor", "Going Upstairs", "Take it Outside", "Finalize Your Home Operating System"
- Visit each area of the home to complete the tasks
- Type your task notes into a Word file and save as "Home Operating System"

Step 3 Digital Option: Upload "Home Operating System" into Everplans

- Login to <u>Everplans</u>
- Select "Homes and Property"
- Select "Basic Info"
- Locate the "Upload property photos" box
- Select "Select file to upload"
- Select the Word file where you stored your completed "Home Operating System"

Step 4 Digital Option: View your Everplan and save PDF to computer

- Login into Everplans
- Select "Preview/Download"
- Scroll through your Everplan which is in PDF format
- Create a folder on your desktop named "Everplan Folder"
- Save the downloaded PDF of your Everplan to the "Everplan Folder"
Everplans automatically stores your plan in your online vault. Each section of our plan is accessible only by you and those to whom you invite to act as your Deputies.

Step 5 Digital Option: Invite Deputies who are trusted family members, friends or caregivers to view your Everplan

- Login to Everplans
- Select "My Deputies" under "Secure Sharing"
- Select "Add" to enter your Deputies' information including their email address
- Select "Choose Permissions" at the bottom of the pop-up screen
- Scroll to "Homes and Property" section
- Select "Now" next to "Homes"
  This will send an email to your Deputies. After they accept the invitation, they will have access to the part of your Everplan where the information about your home is stored.

Step 6 Digital Option: Download the Everplans app

To complete the digital experience explore the Everplans app for the iphone which lets you access, create and share your Everplan.

NON-DIGITAL OPTION (for those who prefer to stay offline)

The Everplans non-digital option comes in the form of a paperback book written by the founders of Everplans entitled, "In Case You Get Hit By A Bus- How to Organize Your Life Now for When You're Not Around Later."

This book can serve as a guide for people who prefer to manually create, store and share their Everplan without going online.

Step 1 Non-Digital Option: Locate in the table of contents and complete the following sections of the book that pertain to the home

"Level 1":
- "Your Pad" [home]: An Operating System (read prompts to help you gather important information room by room)
- "Making First Contact, An Unbroken Home" (read prompts to collect phone numbers of all people associated with maintaining and servicing your home)

"Level 2":
- "Money you owe: Debt, Credit and Insurance, So. Much. Insurance." (focus on and gather information about the insurance for your home)

Step 2 Non-Digital Option: Share the information you gathered
- Share the information you gathered about your home with your trusted family members, friends or caregivers and keep a copy for yourself

HYBRID OPTION (for those who want to create online, store offline and share manually)

The Everplans hybrid option combines parts of the Digital Option with a strategy to remove all data stored online after your plan is created and downloaded to your computer.

Step 1 Hybrid Option: Complete Step 1 and Step 2 of Digital Option
- Digitally create the "Home and Property" and "Home Operating System" using the instructions above

Step 2 Hybrid Option: Complete Step 4 of Digital Option
- Digitally View your Everplan and save PDF to your computer

Step 3 Hybrid Option: Print and share your Everplan

- Print and share a paper copy of your "Home and Property" and "Home Operating System" with trusted family members, friends or caregivers

Step 4 Hybrid Option: Two ways to remove information stored online

A. Delete online personal information and keep Everplans account
- Login to Everplans
- Select "Home and Property"
- Select your home under "Homes"
- Select "Delete All" at the bottom of the left menu bar

B. Delete your account and its contents from Everplans
- Login to Everplans
- Select "Settings" located in the upper right-hand corner of home page
- Select "Delete my account" at the bottom of the page
- Type the word "delete" in the box