

Checklist: Preparing for the needs assessment

Preparing for your needs assessment is key. We take you through the things that will be considered and how to get ready for your assessment, looking specifically at your medical and day-to-day needs.

PREPARING FOR THE ASSESSMENT

All the different aspects of your life should be looked at during the needs assessment, including any emotional, psychological or physical care needs. The person conducting the assessment, usually a social worker or occupational therapist, should cover all the key issues. But if they forget to ask about something important and you don't bring it up, it won't be included.

It's vital that you give as much detail as you can so that the resulting care plan and outcomes match your needs as closely as possible.

Remember that the person doing the assessment can only make notes about 'presenting needs' – those that are mentioned during the needs assessment itself. Don't be tempted to downplay your real day-to-day difficulties because this can affect the level of care you're entitled to. Make a list beforehand of the issues and difficulties you face, to ensure nothing is forgotten.

Here is a checklist of steps to help you prepare for the assessment, along with a list of the kinds of questions that you should be prepared for.

CHECKLIST FOR PREPARING FOR THE NEEDS ASSESSMENT

Sit down with a friend or relative before the assessment to discuss what to say. Think about all aspects of your life, such as personal care, washing, showering, dressing, going to the toilet, preparing meals and shopping. Do you struggle with any of these things? If so, what could help?

- ☐ Make a list of key points and services that might help you live more comfortably at home. What would you ideally like? Don't assume that the assessor knows or understands your difficulties.
- ☐ Look at the local authority eligibility criteria, against which you will be measured. All councils should publish details of their eligibility criteria and make it available to local people. Where appropriate, use the same words to describe your needs.
- ☐ If you have good and bad days, be realistic about the help needed on bad days (even if it's difficult to admit).
- ☐ Try keeping a diary for a few days before the assessment, noting down the things that you can manage on your own, things that you manage with difficulty or things that you can no longer do at all.
- ☐ Think about the ways in which your needs could be addressed. For example, if home care is needed at a specific time, say so and explain why. If a care home is needed near a relative in another part of the country, explain why this is important and give details of where they live.

Assessors might not mention certain needs that are important. Therefore the more you have prepared for the assessment and thought about your needs in advance, the more you can steer the assessment and get all the things you want covered in it. The following questions will give you an idea of what subjects might be covered.

QUESTIONS RELATING TO MEDICAL NEEDS

- What medical problems do you have currently or have had in the past?
- What medication do you take?
- Do you have any ongoing health problems, such as high blood pressure?
- Do you have any physical health problems, difficulties with mobility, problems with incontinence?
- Do you have any sight or hearing problems that cause difficulties?
- Do you have any mental health problems, such as depression?
- Do you have any problems with memory?
- Have you had any falls?
- Are you able to take care of yourself?
- What is your diet like?
- Do you eat regular meals?
- Do you drink or smoke?
- Do you take regular exercise?
- Are there any hobbies and interests that you wish to maintain?
- Do you need any guidance on finances or benefits and allowances, such as the Attendance Allowance or Personal Independence Payments (PIP)?

QUESTIONS RELATING TO DAY-TO-DAY LIVING

- Are you able to look after your home?
- Is your accommodation suitable for your needs?
- Do you have a carer or someone who looks after you?
- What relationships do you have/wish to maintain with people around them?
- Have you been abused, suffered from neglect or had any problems with personal safety? This can be an emotional subject and difficult to discuss, but it's important to share this information at your assessment.
- Can you get to the shops and other facilities and services?
- Where do you want to live? For example, if you need to be in a care home, do you want this to be in a particular area to maintain relationships with family and friends? This can be classed as a need, so it's important to ensure you cover this in the assessment. If the only homes available in that area are more expensive than the area where you currently live, then the local authority where you have been assessed should pay the additional cost.

For more advice and information on arranging care in later life, visit [which.co.uk/care-advice](https://www.which.co.uk/care-advice)

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