



# Own Your Future Assessment Worksheet

## Assessing Needs

An assessment is a comprehensive review of a person’s mental, physical, environmental and financial condition. This helps to establish his or her ability to remain safely independent and identifies risks and ways to reduce them. The list on page 3 may help with assessing one’s needs.

Defining needs is the first step in determining what kind of help and support will best suit your circumstances. First outline your specific concerns. Use the following questions and write out the answers.

What type of help does the care recipient need to live as independently as possible?

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Nutrition:

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Legal/financial:

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Health care:

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Supervision:

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Companionship:

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Homemaking:

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Transportation:

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How much money is available to pay for outside resources:

Will insurance cover any of the services:

How much time is required to provide assistance:

What is the care recipient able to do for him/herself:

What type of help would family and friends be willing to provide:

Notes:

The following list may help with assessing one's needs.

**Physical health** - Make note of these factors; you may need the help of your loved one's doctor.

- Diagnosis of any chronic diseases such as diabetes, high blood pressure, arthritis, emphysema, or stroke.
- Unusual weight loss or gain in a short amount of time.
- Incontinence.
- Balance problems: How steady is the person while walking?
- Persistent fatigue or sleeplessness.
- Swollen feet or legs, or limping.
- Vision problems such as cataracts or use of vision aids.
- Hearing problems: Is there a need for a hearing aid? If there is one, is it being worn?
- Dental problems including gum disease, halitosis and ill-fitting dentures.
- Complaints of pain.
- List of health professionals being seen.

**Mental health** - Make note of these factors; a primary care doctor can help, but a geriatric psychiatrist or neurologist might be more helpful.

- Diagnosis of any psychiatric disorders such as depression, anxiety disorder or psychosis.
- Diagnosis of Alzheimer's or other form of dementia.
- Recent hospitalizations for any of these problems.
- Mood swings, including rage or hostility.
- Forgetfulness or wandering off.
- Sadness or loneliness.
- Decreased interest in reading, writing and communicating.
- Difficulty in maintaining friends.
- Decreased interest in life.

### **Medication use**

- List all medicines taken, prescription or over the counter, with frequency and dosage.
- List all herbal remedies, supplements, traditional home remedies or vitamins being used.
- Is the person able to take medications as directed and avoid interactions?
- Are there any barriers to proper medicine use, such as forgetfulness, expense, poor understanding of purpose and results of use?

### **Daily living**

- List special dietary needs and favorite foods.
- Describe ability to dress, bathe, get up from a chair, use the toilet, use the phone, climb stairs, get help in an emergency, shop, prepare meals, do housework and yard work, and drive safely.

## Home and community safety

- Consider neighborhood safety.
- Consider home safety: Are there throw rugs? A need for handrails in the bathroom? Does the residence have working smoke alarms?
- Is the person able to avoid telephone and door-to-door fraud?
- What level of maintenance do the yard and house require?

## Support system

- Know contact information for key family members, friends, neighbors and clergy.
- Does the person have visitors or is he or she able to visit friends and family?
- Is he able to visit a senior center?
- List membership in organizations and groups.

## Appearance and hygiene - Factors to assess:

- Personal hygiene.
- Overall appearance.
- Oral care. Trimmed nails.
- Well showered and shaven.
- Combed hair.
- Clean clothes.
- Appropriately dressed for weather and occasion.

## Finances - Factors to assess:

- Insurance coverage.
- Long-term care coverage.
- Total assets.
- Legal documents including trusts, living wills and durable powers of attorney.
- Is there an attorney who knows this person?

## Interests/lifestyles

- Hobbies.
- Reading preferences: Are glasses or larger-print books needed? Would books on tape be enjoyable?
- Favorite TV and radio programs.
- Exercise — gardening and walking count!
- Musical instruments played.
- Languages spoken, and is there a preferred language?
- Favorite conversation topics.
- Travel experience.
- Important life events.
- Religious/spiritual background.
- Accomplishments.
- Social activities.

*Information provided by AARP*

## Geriatric Assessment Centers

The Geriatric Assessment Centers are organizations that use a variety of health care professionals such as physicians, nurses, social workers, dietitians, physical and occupational therapists, and others to conduct comprehensive assessments and to develop recommendations for care. The centers usually have a geriatrician on staff, and are often affiliated with a hospital or university medical school. They have access to a wide variety of health and social services. The assessment may be billed to Medicare.

- **The Geriatric Assessment Center at the Neuropsych Center of Greater Cincinnati**  
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- **The Christ Hospital Health and Aging Center**  
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- **UC Women's Center**  
<https://uchealth.com/women/about-us/our-approach/>  
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