Preparing for a Needs Assessment

Understanding what to expect, how to get ready and what happens next

For adults in England

A needs assessment looks at the help you need in everyday life. It should consider your physical, emotional and social wellbeing, and what matters to you.

> *Contact your local council's adult social services team to request an assessment. The assessment is free, regardless of your income or savings. Any assessment of what you may need to pay towards care is separate.*

1. Getting ready

Take some time to think about where help would be useful. Keeping a diary for a few days can help identify activities that are difficult to manage without support. If your needs vary, include examples of both good and difficult days.

There will be questions about your health, home and existing support. Your religious and cultural beliefs should also be considered.

Discuss who you would like involved and whether an online, telephone or face-to-face assessment would meet your needs. Ask for any communication support or adjustments you need.

A family member, friend or carer can help explain difficulties that might otherwise be overlooked. The assessor must identify your needs, including those you find hard to explain.

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2. Getting help to take part

Ask your council about advocacy if you need help understanding the process or expressing your views.

Who can support you?

A family member, friend or carer can attend with you. If you need communication support, such as a British Sign Language interpreter or information in a different format, ask the council before the assessment takes place.

Independent advocacy

The council must arrange an independent advocate if you have substantial difficulty understanding, remembering or weighing up information, or communicating your views, and no appropriate person can support your involvement.

An independent advocate speaks on your behalf. They are not a family member or friend, and they are not employed by the council. Their role is to make sure your voice is heard and your interests are represented throughout the assessment.

3. Questions about your health and wellbeing

These examples can help you prepare for the assessment:

Health

- Do you have any ongoing medical conditions, such as high blood pressure, arthritis or diabetes?
- What medication do you take?
- How are your sight and hearing?
- Have you had any falls?
- Have you had any other health problems that affect everyday life?

Wellbeing

- Do you have difficulty moving around or managing your bladder or bowels?
- Do you feel lonely?
- Can you take part in the activities you enjoy?
- Can you see the friends and family you want to see?
- Do you feel low? How often does this happen?

Think about both good and difficult days when preparing your answers.
The assessment should reflect how your needs vary over time.

4. Questions about your home and everyday tasks

The assessment will ask about your ability to manage at home. Think about these areas in advance:

- Can you keep your home clean and safe?
- How do you manage repairs and maintenance?
- Can you look after your garden?
- Can you manage the stairs?
- Can you prepare and cook meals?
- Can you get to the shops?
- How do you manage money, banking and bills?

Questions about existing support

You will also be asked about the help you currently receive:

- Who helps you?
- What do they do?
- Does anyone help with paperwork, appointments or paying bills?
- Are the people helping you willing and able to continue?

Make it clear if help from family members is not a long-term solution. The assessment should record all your needs, including those currently met by someone else.

5. Be specific about what would help

Make a list of the support you need

Include when you need it and why. Being specific helps the assessor understand the full picture of your day-to-day life. For example:

- I need someone to help me get dressed in the mornings.
- I need someone to remind me to take my medication at 11 a.m. and 3 p.m.
- I need someone to help me cook dinner between 5 p.m. and 6 p.m.
- I would like help getting to church on Sundays.
- I would like to visit my sister twice a month.

6. Understanding eligibility and the outcome

Councils in England use national eligibility criteria under the Care Act, rather than setting their own qualifying rules.

How eligibility is decided

You do not need to use special terms: explain what you struggle with and how this affects your wellbeing. The assessor's role is to identify your needs and consider their impact on your life.

Eligibility for support is separate from any financial assessment of what you may need to pay. Having an assessment does not automatically mean you will qualify for services or receive free care.

After the assessment

Ask for a copy of your assessment, an explanation of the eligibility decision and information about what happens next.

If you disagree with the outcome, ask the council how to raise your concerns or make a complaint. You can challenge a decision you believe is wrong.

Do not wait for the assessor to ask about every difficulty. Explain anything important that has not been covered, including what happens when help is unavailable.

Find your local council

Use the government's online tool to find your local council and contact their adult social services team to request a needs assessment: **www.gov.uk/find-local-council**

7. Preparing for the assessment

Being well prepared can make a significant difference to how your needs are understood and recorded.

1. **Keep a diary**

   Record activities that are difficult to manage without support. Note both good and difficult days so the assessor gets a full picture of how your needs vary.

2. **Think about your religious and cultural beliefs**

   These should be considered as part of your assessment. If they affect the kind of support that would work for you, explain this clearly to the assessor.

3. **Decide who you want involved**

   Consider whether a family member, friend or carer should attend with you. Think about whether an online, telephone or face-to-face assessment would suit you best, and ask about any adjustments you need.

You do not need to wait for the assessor to cover everything. If something important has not been discussed, raise it yourself.

8. If you live elsewhere in the UK

The preparation questions in this guide may still help, but assessment, advocacy and funding rules differ across the UK.

- **Wales:** Contact your local council's social services team for a care and support assessment. Wales has its own law and national eligibility criteria. The assessment considers what matters to you and what support you need. Your right to an assessment does not depend on your finances, although you may need to contribute towards care costs. **Find your local council**
- **Scotland:** Contact your local council's social work department for a care needs assessment. Scotland has different assessment and funding arrangements. Assessed personal care can be provided free, regardless of income or savings, but this does not mean all care is free. Other support and care-home accommodation may involve charges. **Find out how to arrange an assessment**
- **Northern Ireland:** Contact your local Health and Social Care Trust, rather than the council, to request an assessment of need. The Trust considers your care needs, the risks you face and what support would help. Ask the Trust about the eligibility rules and whether charges apply to any services offered. **Find out about assessments and support**

Need some help?

Podplan can help you understand your options and find relevant information and support. Contact our member support team if you're unsure where to start or book a PodPlanPlus consultation to discuss your situation.

This guide provides general information only and is not financial, legal or medical advice. Care funding rules and eligibility can change. Always check the current rules and seek professional advice where appropriate. This guide describes England's system. Different arrangements apply in Wales, Scotland and Northern Ireland.

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