

Needs Assessment

To be completed at initial interview.

Name.....

Agency worker.....

Date.....

PERSONAL INFORMATION

Name		Tel.	Mobile.
Address		DOB	
		NI No	
		Marital Status	
		Religion	
Person to be contacted in emergency			

Next of Kin – address & telephone number

Other agencies involved and frequency of visits	
Care Manager/Social Worker/Carer	
CPN	
Carer/Family/Friend	

GP	
Consultant Psychiatrist	
Other Voluntary Support	
Support Networks	

Ethnic Origin (tick one box only)

White British	☐	Mixed Other	☐	Asian Other	☐
White Irish	☐	Black Other	☐	Caribbean	☐
White Other	☐	Chinese	☐	African	☐
White & Black Caribbean	☐	Indian	☐	Other (please specify)	
White & Black African	☐	Pakistani	☐		
White & Asian	☐	Bangladeshi	☐		
First Language:.....				Interpreter/signer needed?	

[Type here]

[Type here]

[Type here]

Section One – Managing Accommodation – Positive History

Current Need

Obligations of Tenancy

Security

Sustaining Tenancy

Repairs

Section Two – Personal Administration – Positive History

Current Need

Support with correspondence Literacy

Letters

Telephone

Section Three – Income & Benefits – Positive History

Current Need

Support to claim maximum benefits

Understanding of entitlement

Manage own claim

Current Entitlement (complete check list)

[Type here]

[Type here]

[Type here]

Section Four – Bills & Budgeting – Positive History

Current Need

Assist with bills payment: - Utilities, Rent

Prevention Resolution Debt

Budgeting skills

Access to banking

Section Five – Social Networks & Relationships – Positive History

Current Need

Dependent Family

Family & Friends

External groups/ Services

Social Skills/Networks

Community Facilities

Domestic Violence – Positive History

Current Need

Safety Planning

Security

Children

Legal Options

Emergency Details

[Type here]

[Type here]

[Type here]

Section Six – Health – Positive History

Disability / Client Group

Current Need

Physical & Emotional Health

Current Medication

Access Services

Support to Promote Good Health

Health

Current Medication

Access Services

Support to Promote Good Health

Section Seven – Offending Behaviour – Positive History**Current need**

Engage with Probation

Support to Address & Reduce Offending Behaviours

[Type here]

[Type here]

[Type here]

Section Eight – Education, Training and Employment – Positive History**Current Need**

Accessing Services

Daytime Activities / Volunteering

Employment

Education/Training

Section Nine – Cultural/ Religious/ Other Welfare Services – Positive History**Current Need** (Decided on individual need)

Additional Initial Support

Cultural

Religious

Section Ten – Recommendations

[Type here]

[Type here]

[Type here]

Interviewer 1: _____ Position _____ Date _____

Interviewer 2: _____ Position _____ Date _____

External Agency

Name

Signature

I confirm all the information I have given is accurate.

Name

Signature

Date

BENEFITS CHECKLIST

Private Pension ☐

State Benefits:

Housing/ Council Tax Benefit ☐

Supporting People Grant ☐

State Retirement Pension ☐

State Widows Pension ☐

Income Support ☐

Job Seekers Allowance ☐

Disability Living Allowance ☐ Care ☐ Mobility

Incapacity Benefit ☐

Severe Disablement ☐

Attendance Allowance ☐ Lower ☐ Higher

Carers Allowance ☐

Working Tax Credit ☐

Other (please state)

Child Benefit ☐

Child Tax Credit ☐

[Type here]

[Type here]

[Type here]

Summary of Support Identified

[Type here]

[Type here]

[Type here]

Will you require help with any of the following?			
	Yes	Some	None
Budgeting			
Rent Payments			
Housing Benefit			
Council Tax			
Water / Sewage Rates			
Electricity/ Equipment			
Gas/ Equipment			
Bank Accounts			
Meter Readings/ Connections / Bills			
Furniture			
Decorating/ DIY Improvements			
Reporting Repairs			
Personal Safety and Home Security			
Aids and Adaptations			
Referrals for Personal care			
Referrals for Home Care			
Registering with GP and Local Health Agencies			
Cooking/ Meal Planning/Buying food			
Arranging Social Activities/ Meeting People			
Coping with Problems			
Understanding and Completing Form			
Letter Writing/ Use of phone			
Arranging Appointments			
Attending Meetings and Interviews			
Are there any other areas where you feel you may need support?			
If Yes, what are they?			

[Type here]

[Type here]

[Type here]