

## Factsheet A21: Assessment of your needs

**Part One:** The first part is your **Eligibility Assessment**. This is carried out by a care assessor either over the telephone or during their visit (see Part Two below).

To be eligible for support you must be able to say 'yes' to all of these questions:

1. Do you have needs due to or related to a physical or mental impairment or illness?
2. Do those needs mean that you are *unable* to meet two or more specified outcomes?
3. As a consequence there is, or is likely to be a significant (in other words important) impact on your wellbeing

The second two (of those three questions) need a little bit more explanation:

### 2. Outcomes

As a result of your needs you are unable to achieve two or more of these outcomes:

- Managing and maintaining nutrition
- Maintaining personal hygiene
- Managing toilet needs
- Being appropriately clothed
- Being able to make use of the home safely, for example moving around or using appliances
- Maintaining a habitable home environment
- Developing and maintaining family or other personal relationships



- Accessing and engaging in work, training, education or volunteering
- Making use of necessary facilities or services in the local community including public transport and recreational facilities or services
- Carrying out any caring responsibilities the adult has for a child

You are regarded as unable to achieve an outcome if you:

- Are unable to achieve it without assistance
- Are able to achieve it without assistance but doing so
  - causes you significant pain, distress or anxiety **OR**
  - endangers or is likely to endanger the health or safety of yourself or someone else, **OR**
  - it takes significantly longer than would normally be expected.

### 3. Wellbeing

This is the question that most often catches people out. This is because it often gets forgotten about once people have worked out that they have two or more outcomes. However, this question is just as important, and even if you have your outcomes, if you do not prove that it affects your wellbeing then you will most likely be assessed as ineligible.

Wellbeing is defined as:

- Personal dignity
- Physical, emotional and mental health
- Protection from abuse and neglect
- Control over day to day life
- Participation in work, education, training and recreation
- Social and economic wellbeing



- Domestic, family and personal relationships
- Suitability of living accommodation
- An individual's contribution to society

### Example

'Brian' has a physical disability which affects his ability to wash himself. He is unable to reach his lower limbs and back without suffering pain. When he does try to wash he finds it extremely tiring, and ends up going back to bed afterwards as he needs to rest. For the same reason he struggles with maintaining his home. He finds it exhausting trying to keep on top of all his housework. When he does try, he has to stop frequently as it exhausts him. He is also finding that he is in much more pain now than he used to be. As a result the housework is not completed.

Brian is spending much more time in bed recovering from over-exerting himself so he is seeing less of his family, and getting out of his home much less than he used to. He has also stopped inviting people round so that they do not see the state of his home (which he used to be quite proud of). He is now isolated and feeling low as a result. So, looking at the original questions this is how Brian can answer them:

1. Do you have needs due to a physical or mental impairment or illness? *Yes I have a physical illness*
2. Do those needs mean that you are unable to meet two or more specified outcomes? *Yes, I am unable to meet personal hygiene and maintaining a habitable home environment*



3. As a consequence there is, or is likely to be a significant impact on your wellbeing. *Yes. As a result of struggling to keep myself clean, I then do not have the energy for anything else, and am spending a lot of time in bed. This makes me feel isolated. Now that I am also not able to keep on top of looking after my home either I am even more isolated as I do not feel comfortable inviting people to my home. I am losing touch with the people who are important to me, and my mental health is suffering.*

**Part Two:** The second part is what happens if you pass the Eligibility Assessment.

The care assessor who has completed Part One (above) will continue on to Part Two. The assessment is based around a series of questions called a Personal Budget Questionnaire (PBQ) that you and your care assessor will complete together. All of the questions are necessary to determine the support needs that you have.

As you work through the questionnaire it is important that you and the care assessor agree on the answers you have given. If you don't agree or you feel it is not a true reflection of what you have said you can ask for a team manager to get involved. You can ask for this by telling your care assessor at the time, or by calling Norfolk County Council on 0344 800 8020 (Mon-Fri 9am-5pm).

During your assessment you should also have the opportunity to discuss other things that may help you; this could include installing grab rails, having your bathroom converted to a wet room or having a stair lift installed.

Once the assessment is complete the Personal Budget Questionnaire will be put through a system at Norfolk County Council which generates an estimated budget (also



known as an 'indicative budget') for the year. This amount has to then be signed off (agreed) by a manager. This figure is the maximum amount you may receive to meet your care needs, but it is just an estimate and you should be able to request an increase if the amount is not sufficient to meet your needs. When planning your care, if you can meet your needs for less than this amount, then your total budget amount will reduce.

Your care assessor should give you a copy of your completed assessment and Personal Budget Questionnaire and you should be told what your indicative budget amount is. You will then be able to use your assessment paperwork to create your support plan.

## **Carers Assessments**

Carers are entitled to an assessment of their own needs. They would need to show that:

1. Their needs arise as a consequence of providing necessary care
2. The effect of the carer's needs is:
  - a. Deterioration (actual or risk of) in the carer's physical or mental health, or
  - b. They are unable to achieve one or more significant outcomes
3. The consequence of this is a significant impact on the carer's wellbeing.

If you require further information or would like this factsheet in an alternative format you can contact us by calling: 01508 491210, by emailing: [info@equallives.org.uk](mailto:info@equallives.org.uk), or by writing to: Equal Lives, 15 Manor Farm Barns, Fox Road, Framingham Pigot, Norfolk, NR14 7PZ.

