

CAREGIVER NEEDS ASSESSMENT Best Practices

- Do not give the Caregiver Needs Assessment to participants to fill out on their own.
 - The form should be used as a discussion guide, not as a check list.
 - The Caregiver Needs Assessment must not be used to determine eligibility for AFCSP or NFCSP. Official program enrollment forms must be used.
1. “Conversation Starter” questions on Page 5 are not reported to the State in DHS REDCap. However, these questions can help caregivers open-up about their situation. Sharing personal feelings is uncomfortable or embarrassing for some individuals, so be patient. Let each person tell their story at their own pace, and let them know that anything they say will not be judged and will be kept in strict confidence.
 2. The five sections of the Assessment refer to “unmet” needs.
“Unmet” needs means:
 1. Lack of access – Can be a variety of reasons (lack of financial resources, lack of knowledge, lack of transportation, no providers available, etc.)
 2. Has access or is receiving, but not in sufficient quality, quantity or convenience
 3. The same need may apply in several sections, including being both a care recipient need and a caregiver need. Mark the need in every section that applies.
 4. Top priorities should be identified by individual caregivers. Do not assume to know what a person’s/family’s priorities are. What one person feels they need most will not be the same for others.
 5. When trying to determine person’s top needs, review notes you’ve taken and discuss any patterns that you see across the five sections of the assessment. Ask if what you’ve noticed are indeed their priorities, or are there other unmet needs that need tending to first?
 6. Be able to suggest options or explain a potential remedy to problems that caregivers are likely to be facing. They are looking to us for resources, so being able to speak knowledgably about what is available is key to building trust. For example, if a person mentions that they wish they had someone to talk to in the middle of the night when their husband starts wandering or acting out, explain that there is a 24/7 Alzheimer’s Hotline with experts ready to provide guidance at any hour of the day or night.
 7. Options provided under each “unmet needs” section can also be used as conversation starters. The simple question, “How are you feeling? Are you getting enough sleep?” can lead to a more in-depth discussion about the wide variety of needs identified in Sections II, III and IV.

8. If you identify needs that can only be addressed by another person in your agency, or the caregiver must be referred to another agency, do not make the person tell their story all over again. Act as a bridge between agencies for them. If referring within your own agency, you can even share the results of the Caregiver Needs Assessment.
If the referral is outside your agency, ask the caregiver for permission to share some basics of their situation and/or the results of their needs assessment with the other agency staff. Sharing what you learned during your initial discussion will save everyone time and reduce the level of frustration experienced by the family.
9. While the assessment is perfect for capturing unidentified needs, there may be situations when the caregiver is not willing to divulge much information or hasn't reached a point of needing much help beyond the simple thing they requested.
"Forcing" them to discuss all sections of the Caregiver Needs Assessment might turn them off to receiving support now and/or in the future. In that case, you may want to expedite the assessment for a caregiver who comes to you with a one-time simple request (such as a piece of adaptive equipment) or who is resistive. Save asking for a longer meeting to discuss their needs and explain potential resources to a later date when they are not feeling in crisis.
NOTE: If a caregiver needs assessment is expedited due to a crisis situation or inability to connect with a caregiver, the results of that "assessment" still must be entered into REDCap indicating what the one or two needs were that brought them to your office.
10. A Caregiver Needs Assessment must be completed whenever you enroll a new caregiver in either caregiver support program (AFCSP or NFCSP) who will receive respite or supplemental services. It is not necessary to complete an assessment if the caregiver is only planning to attend a support group or Powerful Tools for Caregivers class.
11. Each caregiver should only be entered into REDCap once, shortly after completing their initial Caregiver Needs Assessment. This is true even if a caregiver participates in both programs or is caring for multiple individuals.
12. A Caregiver Needs Assessment should be conducted at least once per year.
Results of a second or subsequent assessment do not need to be entered into REDCap.
Again, each caregiver should only be entered into REDCap once.
13. For families utilizing AFCSP, financial eligibility must be reviewed every year. The annual review is the perfect time to update the family's needs assessment or ask them to complete a post evaluation. Their needs and situation have likely changed over the year, and this is a prime opportunity to ask how our program has helped them, as well as learn what other supports could be of benefit.