

My Initial Assessment

Guidance Notes

The My Initial Assessment (MIA) is split into sections;

Section 1 = this is generally completed by the CAD Hub over the phone with the customer to get an accurate picture on the customers personal details and current situation. This could however also be completed in a team by social care staff if for an existing customer.

Section 1a = this is specifically for customers who feel they would like a disability assessment and again would generally be completed at CAD Hub.

Section 2 = this is also completed at CAD Hub with input from Social Care staff to record the decisions made with how the case is to progress or not and why.

Section 3a = this is to be completed by social care staff when they complete a visit to assess the customer, or by the Hospital team if hospital. This would be blank if the referral was for disability referral only. You may also decide to complete a MACA instead of a section 3a.

Section 3b = this is for OT's to complete when they complete a visit to assess the customer for adaptations and equipment.

Section 3c = this is completed by the sensory service if the customer requires a Visual Impairment Assessment.

Section 3d = this is completed by the sensory service if the customer requires a Hearing Impairment Assessment.

Section 4 = can record carers details if the carer is present at the assessment, but should arrange to complete a Carers assessment with them if requested.

A MIA should therefore not be finalised until all relevant staff have completed their sections, but just save the changes. Some sections of the MIA will copy forward to a MACA and a CHC Social Care Report. You need to ensure you complete as much detail as possible and ensure it gives an accurate picture of the customers needs.

SECTION 1

Customer Information

The following statement should be read to the person being referred for services and their consent sought:

Personal data that you provide on this form is treated in confidence and complies with the requirements of the Data Protection Act (1988). The information will not be used for any other purpose than that advised to you. The Council may however contact other organisations to verify the information on this form. By agreeing to this statement, as a service user or representative on behalf of the service user, you are explicitly providing consent that the personal data and sensitive personal data provided can be used for purposes other than this form. The information that you give to us will be used to assess and provide suitable Health and Social Care Services.

*If someone is hearing impaired then you may wish to omit reading out this statement and will be addressed at a later stage.

Self Referral

Consent Given? Yes ☐ No ☐

3rd Party Referrer

Is the customer aware of the referral? Yes ☐ No ☐

Person Requiring Assessment

Protocol Number

NHS Number

National Insurance Number

Title

Surname

First Name(s)

Date of Birth:

Gender: Male ☐ Female ☐

Marital Status:

- ☐ Married
- ☐ Single
- ☐ Divorced
- ☐ Widowed
- ☐ Living with Partner
- ☐ Separated
- ☐ Unknown
- ☐ Prefer Not to Say

Permanent / Other Residence	
Post Code	
Current Address (if different to above)	
Post Code	
Ethnicity	First Language
Is an interpreter required? Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, what language is required?	
Religion or Belief	
Sexual Orientation <input type="checkbox"/> Heterosexual <input type="checkbox"/> Bisexual <input type="checkbox"/> Lesbian/Gay Woman/Gay Man <input type="checkbox"/> Prefer Not to Say	Are you pregnant? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Prefer Not to Say <input type="checkbox"/> Not Known
Have you ever had any gender reassignment surgery? Yes <input type="checkbox"/> No <input type="checkbox"/> Prefer Not to Say <input type="checkbox"/>	
Domestic Arrangements	
Do you live alone?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Type of Accommodation	
Do you have a key safe?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Type of Tenure: <input type="checkbox"/> Bed and Breakfast <input type="checkbox"/> Emergency accommodation <input type="checkbox"/> Lives rent free <input type="checkbox"/> Not applicable <input type="checkbox"/> Owns property	

<input type="checkbox"/> Private Rented <input type="checkbox"/> Social Rented <input type="checkbox"/> Other - please supply details:	
If not owner occupier, please provide contact details for Landlord or Housing Association:	
Name:	
Address:	
Post code:	
Contact No:	
Email address:	
Employment	
Are you in paid employment? If Yes: Position: Employment Type: <input type="checkbox"/> Employed (Paid) <input type="checkbox"/> Self-Employed (Paid) <input type="checkbox"/> Self-Employed (Unpaid) <input type="checkbox"/> Voluntary (Paid) <input type="checkbox"/> Voluntary (Unpaid) <input type="checkbox"/> Unemployed <input type="checkbox"/> Retired Weekly hours:	Yes <input type="checkbox"/> No <input type="checkbox"/>
Customer Contact Details (please tick the best number to be contacted on)	
<input type="checkbox"/> Home Phone Number	
<input type="checkbox"/> Work Phone Number (if employed only)	
<input type="checkbox"/> Mobile Phone Number	
<input type="checkbox"/> Other (Relative/Friend etc)	
E-mail address	
Carer Details	
Do you have someone that supports you and helps you with your day to day life that you consider to be your Carer?	Yes <input type="checkbox"/> No <input type="checkbox"/> *

If customer has a carer complete below:	
Is that person your next of kin?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Do they live at the same address?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are you aware that carers are entitled to an assessment of their needs?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you think that your Carer would like a Carers Assessment?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Carers first name	
Carers surname	
Carers Address	
Carers contact details	
If you think the carer would not like an assessment, would they be happy for us to pass on their details to the Carers Service?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Information about the Carers Service is available on our website at www.Bury.Gov.Uk/Adults . Would you like us to send some information about the Carers Service?	<input type="checkbox"/> No <input type="checkbox"/> Yes by e-mail (please provide e-mail address below) <input type="checkbox"/> Yes by letter (please provide address below)
Next of Kin	
Do you have a Next of Kin?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Name	
Relationship	
Contact Number	
Do they live at the same address as you?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If not, please state address:	

Emergency Contact	
If not Next of Kin – please give details:	
Name	
Address	
Contact Number	
Relationship	
GP Details	
Name of GP:	
Address of GP:	Telephone No. of GP:
Other Professionals (including Health)	
Do you have any professionals involved in your care at the moment? :	Name and contact details of Professional:
<input type="checkbox"/> No Professionals involved	
<input type="checkbox"/> Social Worker	
<input type="checkbox"/> District Nurse	
<input type="checkbox"/> CPN	
<input type="checkbox"/> Physiotherapist	
<input type="checkbox"/> Occupational Therapist	
<input type="checkbox"/> Rehab Officer Hearing Impairment	
<input type="checkbox"/> Impairment/Rehab Officer Visual Impairment/Assessment worker Visual Impairment	
<input type="checkbox"/> Consultant	

<input type="checkbox"/> Personal Assistant (PA)	
<input type="checkbox"/> Hospice /Macmillan/ Palliative Care Services	
<input type="checkbox"/> Falls Prevention Service	
<input type="checkbox"/> Other e.g. support groups- please provide details	

How do you feel we can help you?

Existing Support Networks

Do you currently receive any support from the following:

☐ Mobile Warden Service (Support to Live at Home)

☐ Employed Cleaner

☐ Carelink

☐ Home Care

Name of Agency:

How many visits do you have per day?

How many carers come on a visit?

<input type="checkbox"/> Day Care	Where do you attend Day Care?
	How many times per week do you attend?
<input type="checkbox"/> Meals-on-Wheels	How many days per week do you receive them?
<input type="checkbox"/> Planned Regular Short Term Breaks	Do you have planned regular short-term breaks?
	Who provides the breaks?
	Date of your last stay?
<input type="checkbox"/> Friends & Family	Who supports you? <input type="checkbox"/> Parent <input type="checkbox"/> Son <input type="checkbox"/> Daughter <input type="checkbox"/> Brother <input type="checkbox"/> Sister <input type="checkbox"/> Aunt <input type="checkbox"/> Uncle <input type="checkbox"/> Grandparent <input type="checkbox"/> Other – please supply details:
	What support do they provide?
<input type="checkbox"/> Other	please supply details:
Are you in receipt of a Personal Budget?	Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know <input type="checkbox"/>
Are you in receipt of any benefits	Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know <input type="checkbox"/> If Yes, provide details
Are you aged between 17-25 and receiving support from Children's Services? (transitions case)	Yes <input type="checkbox"/> No <input type="checkbox"/>

If Yes please give details of what support and any professionals involved with you.	
Do you have fire/ smoke alarms fitted?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If ticked 'no', does the customer want to be referred to the GM Fire Service? Yes/No	
If yes, Would you be able to hear your smoke alarm at night (without your hearing aid if the customer wears one)?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Have you had an Affordable Warmth Assessment?	Yes <input type="checkbox"/> No <input type="checkbox"/>

Communication

Do you have any difficulties with your: <ol style="list-style-type: none"> Hearing Sight Speech (disability/health related) Confused/ Dementia Literacy (Reading or writing) Do you have a dual sensory loss?	Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes go to Hearing section below but if the customer is struggling to hear the conversation go the end and send to Triage. Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes go to Sight section below Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes go to Speech section below Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes go to Confused/ Dementia section below Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes go to Literacy section below Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes go to Other section below
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Hearing	
Are you registered hearing impaired?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are you registered deaf?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you have a hearing aid?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you wear your hearing-aid?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Does your hearing-aid work?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Have you had a hearing test in the last 18 months?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Can you hear your television?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Can you hear your doorbell or knocking on your front door?	Yes <input type="checkbox"/> No <input type="checkbox"/>

Can you hear your telephone ring?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Can you hear on the telephone?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Can you hear your alarm clock?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you have difficulty hearing in a group social setting such as a crowd?	Yes <input type="checkbox"/> No <input type="checkbox"/>
What is your preferred format for any future communication? <input type="checkbox"/> Text <input type="checkbox"/> Email <input type="checkbox"/> Letter <input type="checkbox"/> Face to face <input type="checkbox"/> Other- please give details:	
Comments on any of the above... Give details of any specific communication issues for the customer, eg any use of communication aids, and/or support required in particular environments	
Sight	
Are you registered visually impaired?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are you registered blind?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Have you had a sight test within the last 12 months?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Have you visited the Low Vision Aid Clinic in the last 12 months?	Yes <input type="checkbox"/> No <input type="checkbox"/>
What is your preferred format for any written communication? <input type="checkbox"/> Large print <input type="checkbox"/> Audio CD <input type="checkbox"/> Braille <input type="checkbox"/> Other - please give details:	
Comments about your sight Give details of specific issues relating to sight for this customer	
Speech	
Please describe your speech impairment and how this affects you: Highlight the individual issues relating to this customers speech and how this affects their daily living	

Do you use any equipment to support how you communicate? If yes, please give detail of the specific equipment used and how this assists the customer	
How would you like us to contact you in the future?	
Confused/ Dementia	
How does this affect you? Give specific examples of how the customers daily life is affected by any confusion they may experience within and outside of the everyday living environments	
Literacy	
Do you have any reading or writing difficulties?	Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, please give details
Do you have any equipment to help you with reading/writing?	Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, please give details
Other	
What is your communication difficulty and how does this affect you? Summarise what the issues are and add any further comments relevant to this area of need	

General Health	
Have you got any health problems or needs?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If YES please supply details: Summarise what the issues are and add any further comments relevant to this area of need	

Do you have a diagnosis of a medical condition?	Yes <input type="checkbox"/> No <input type="checkbox"/>
What is your diagnosis? (Insert glossary of terms/ medical dictionary)	
When were you diagnosed?	
Who were you diagnosed by?	
Are you currently taking any medication?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are you having any difficulties taking your medication? If yes, give details of the specific difficulty being experienced by the customer and how this affects them	
Have you been discharged from hospital in the last 6 months? Yes <input type="checkbox"/> No <input type="checkbox"/>	
What was the reason for your hospital admission? Describe the detail and the circumstances around the admission	
Which hospital did you attend? <input type="checkbox"/> Fairfield General Hospital <input type="checkbox"/> Floyd Unit <input type="checkbox"/> North Manchester General Hospital <input type="checkbox"/> Manchester Royal Infirmary <input type="checkbox"/> Salford Royal Hospital (Hope) <input type="checkbox"/> Oldham Royal Infirmary <input type="checkbox"/> Rochdale Infirmary <input type="checkbox"/> Royal Bolton Hospital <input type="checkbox"/> Royal Blackburn Hospital <input type="checkbox"/> St Mary's Hospital <input type="checkbox"/> The Christie Hospital <input type="checkbox"/> Wythenshawe Hospital	

<input type="checkbox"/> Withington Community Hospital <input type="checkbox"/> Other – please provide details	
FALLS	
Have you experienced falls in the last 6 months?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If YES, how many falls have you experienced?	
Please supply details of your falls: Is there a particular trigger or pattern to the falls? E.g. is it to do with sight impairment, physical disability/illness, environmental hazards, balance issues etc	

Please be advised that some assessed services are means tested. This may mean that you have to contribute in part or in full to the cost of services that you may need following your assessment.

Do you wish to continue with this referral? Yes ☐ No ☐

SECTION 1A Initial Disability/ Sensory Referral

Property Details

What style of property do you live in?

- ☐ Caravan or other mobile or temporary structure
☐ Care Home (with nursing)
☐ Care Home (without nursing)
☐ Flat, Maisonette or apartment
☐ Terraced House
☐ Detached House or Bungalow
☐ Semi-Detached House or Bungalow
☐ Sheltered Housing
☐ Other- please supply details:

How many years have you lived in this property?

How many bedrooms does the property have?

Does your property have the following rooms:

- ☐ Kitchen
☐ Dining-room
☐ Kitchen/Dining-room
☐ Lounge
☐ Conservatory
☐ Den/Playroom
☐ Study
☐ Bedroom
☐ Other- please supply details:

How many

☐
☐
☐
☐
☐
☐
☐
☐
☐
☐

How many adults live in the house?

How many children live in the house and what are their ages?

No of children

Ages

OUTDOOR MOBILITY

Can you get from the pavement to the door of your property independently?

Yes ☐ No ☐

Is there adequate outdoor lighting at your main door?

Yes ☐ No ☐

Do you use any equipment/adaptations to help you?

☐ No

If you don't use any equipment to help you, how do you manage?

<input type="checkbox"/> Yes	<p>What do you use?</p> <p> <input type="checkbox"/> Walking Stick <input type="checkbox"/> White Walking Stick with additional colour indicator <input type="checkbox"/> Crutch <input type="checkbox"/> Walker <input type="checkbox"/> Self-propelling wheelchair <input type="checkbox"/> Step-lift <input type="checkbox"/> Attendant propelled wheelchair <input type="checkbox"/> Ramp <input type="checkbox"/> Grab-rails <input type="checkbox"/> Scooter * <input type="checkbox"/> Powered wheelchair* <input type="checkbox"/> Long Cane <input type="checkbox"/> Guide Dog <input type="checkbox"/> Previous mobility training (for Visual Impairment) <input type="checkbox"/> Other– please supply details: </p>
<p>*Has this been assessed and recommended by a medical professional? Yes <input type="checkbox"/> No <input type="checkbox"/></p>	
<p>Comments about outdoor mobility</p> <p>Give as much detail as possible to highlight the issues for the customer when mobilising outdoors. E.g. is support required to enable the customer to mobilise safely outdoors? If so, what are the factors and risks involved?</p>	
<p>GETTING ABOUT WITHIN YOUR OWN HOME</p>	
<p>Can you hear the doorbell or if someone is knocking at your door?</p>	<p>Yes <input type="checkbox"/> No <input type="checkbox"/></p>
<p>Do you have any equipment to help you?</p>	
<input type="checkbox"/> No	<p>If you don't have any equipment to help you answer the door, how do you manage?</p>
<input type="checkbox"/> Yes	<p>What do you use?</p> <p> <input type="checkbox"/> Key safe <input type="checkbox"/> Door intercom <input type="checkbox"/> Flashing door bell </p>

<input type="checkbox"/> Vibrating Pager <input type="checkbox"/> Other -please supply details	
Do you use any equipment/adaptations to help you mobilise indoors?	
<input type="checkbox"/> No	If you don't use any equipment to help you, how do you manage?
<input type="checkbox"/> Yes	What do you use? <input type="checkbox"/> Walking Stick <input type="checkbox"/> White Walking Stick with additional colour indicator <input type="checkbox"/> Crutch <input type="checkbox"/> Furniture Walk <input type="checkbox"/> Walker <input type="checkbox"/> Self-propelling wheelchair <input type="checkbox"/> Step-lift <input type="checkbox"/> Attendant propelled wheelchair <input type="checkbox"/> Ramp <input type="checkbox"/> Grab-rails <input type="checkbox"/> Scooter * <input type="checkbox"/> Powered wheelchair* <input type="checkbox"/> Long Cane <input type="checkbox"/> Guide Dog <input type="checkbox"/> Previous mobility training (for Visual Impairment) <input type="checkbox"/> Other– please supply details:
*Has this been assessed and recommended by a medical professional? Yes <input type="checkbox"/> No <input type="checkbox"/>	
Comments about indoor mobility Give as much detail as possible to highlight the issues for the customer to mobilise safely indoors? Are there issues with transfers etc? If so, has an Occupational Therapy Assessment been undertaken? If so, highlight the factors and risks involved.	
STAIRS	
Do you have any stairs in your property?	Yes <input type="checkbox"/> No <input type="checkbox"/>

Do you have any equipment/adaptations or additional lighting to help you with the stairs?	
No <input type="checkbox"/>	If you don't have any equipment or adaptations, how do you manage the stairs?
Yes <input type="checkbox"/>	What equipment/ adaptations do you use? <input type="checkbox"/> banister/ hand rail on one side <input type="checkbox"/> Banister/ hand rail on two sides <input type="checkbox"/> Stair lift <input type="checkbox"/> Through floor-lift <input type="checkbox"/> Additional lighting <input type="checkbox"/> Other– please supply details:
Comments about using stairs Does the customer have a specific way of undertaking this activity. Are there any risks involved in undertaking this activity? Is additional support required to ensure safety?	
Thinking about your living room/lounge...	
Can you get on and off your chair/armchair/settee independently?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you have any equipment or need support to help you get in and out of the chair?	
No <input type="checkbox"/>	If you have no equipment/support, how do you manage to get in and out of your chair?
Yes <input type="checkbox"/>	What equipment/ Support do you have? <input type="checkbox"/> Chair raisers <input type="checkbox"/> Riser-recliner chair <input type="checkbox"/> Hoist

	<input type="checkbox"/> Help from Carer <input type="checkbox"/> Other – please supply details:
Additional comments: Describe how any additional support or equipment assists the customer to undertake this activity.	
<i>Thinking about your daily living tasks (Sensory impairment)...</i>	
Can you manage to do your shopping? Yes <input type="checkbox"/> No <input type="checkbox"/> If No, please explain how you manage Describe the current situation	
Can you manage to do your laundry/ironing/housework? Yes <input type="checkbox"/> No <input type="checkbox"/> If No, please explain how you manage Describe the current situation	
Are you having accidents e.g. burns when doing any of the above? Yes <input type="checkbox"/> No <input type="checkbox"/>	
<i>Thinking about your kitchen...</i>	
Can you prepare a hot drink?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If yes, do you have any difficulty preparing a hot drink?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If yes- Please explain the nature of your difficulty? (for example frequent burns, how often does this happen?)	
Do you need any equipment or support to help you make a hot drink?	
No <input type="checkbox"/>	If you have no equipment/support, how do you manage to make a hot drink?
Yes <input type="checkbox"/>	What equipment/ Support do you use? <input type="checkbox"/> Carer <input type="checkbox"/> Family member <input type="checkbox"/> Trolley <input type="checkbox"/> Small kitchen aid- e.g. kettle tipper/

	liquid level indicator-please give details: <input type="checkbox"/> Other- please give details:
Can you prepare a light meal?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If yes, do you have any difficulty preparing a light meal?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If yes, what is the nature of your difficulty?	
Describe in detail the difficulty the customer experiences	
Do you need any equipment or support to help you make a light meal?	
No <input type="checkbox"/>	If no equipment/support is required, how do you manage to make a light meal?
Yes <input type="checkbox"/>	What equipment/ Support do you have? <input type="checkbox"/> Community meals/ Meals on Wheels <input type="checkbox"/> Microwave meals / ready-made meals <input type="checkbox"/> Carer <input type="checkbox"/> Family Member <input type="checkbox"/> Trolley <input type="checkbox"/> Small kitchen-aid - please give details <input type="checkbox"/> Other – please supply details:
Additional comments (such as difficulty in seeing dials on cooker/ microwave/ lighting a gas cooker/ reading instruction on ready meals) Describe in detail the current situation and issues involved for the customer	
<i>Thinking about your bedroom...</i>	

Can you access your bedroom independently?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Can you get in and out of bed independently?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you have any equipment or support to help you get in and out of bed?	
No <input type="checkbox"/>	If no equipment /support how do you manage to get in and out of bed?
Yes <input type="checkbox"/>	What equipment/ Support do you use? <input type="checkbox"/> Bed lever <input type="checkbox"/> Bed rail <input type="checkbox"/> Pillow rest <input type="checkbox"/> Hospital/Specialist Powered Bed <input type="checkbox"/> Hoist <input type="checkbox"/> Help from Carer <input type="checkbox"/> Mattress variator <input type="checkbox"/> Other – please supply details:
Do you have any concerns about getting dressed or undressed?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If Yes – please supply details	
Do you have equipment or support to help you get dressed?	
No <input type="checkbox"/>	If you do not use equipment/support, how do you manage to get dressed?
Yes <input type="checkbox"/>	What equipment/ Support do you use? <input type="checkbox"/> Carer <input type="checkbox"/> Minor equipment such as to help with buttons, tights etc - please give details: <input type="checkbox"/> Other- Please give details:
Additional comments:	
<p style="text-align: center;"><i>Thinking about your bathroom.....</i></p>	

Can you access your bathroom independently?	Yes <input type="checkbox"/> No <input type="checkbox"/>
What type of bath do you have? <input type="checkbox"/> Do not have a bath <input type="checkbox"/> Straight bath <input type="checkbox"/> Corner bath <input type="checkbox"/> Other -please supply details:	
Do you have any equipment or support to help you with bathing?	
No <input type="checkbox"/>	If you do not use equipment/support, how do you manage bathing?
Yes <input type="checkbox"/>	What equipment/ Support do you use? <input type="checkbox"/> Grab rails <input type="checkbox"/> Bath lift <input type="checkbox"/> Bath hoist <input type="checkbox"/> Bath board <input type="checkbox"/> Bath seat <input type="checkbox"/> Bath mat <input type="checkbox"/> Bath step <input type="checkbox"/> Help from Carer <input type="checkbox"/> Other -please supply details:
What type of shower do you have? <input type="checkbox"/> Do not have shower <input type="checkbox"/> Do not have shower but have shower attachment fitted to taps <input type="checkbox"/> Shower over bath <input type="checkbox"/> Separate shower cubicle <input type="checkbox"/> Wet room / level access shower <input type="checkbox"/> Other – please supply details:	
Do you have any equipment or support to help you with showering?	
Describe the specific support required	
No <input type="checkbox"/>	If you do not use any equipment/support how do you manage showering?

Yes <input type="checkbox"/>	What equipment/ Support do you use? <input type="checkbox"/> Help from Carer <input type="checkbox"/> Grab rails <input type="checkbox"/> Shower seat/stool <input type="checkbox"/> Small aid such as long handled sponge, toe cleaner etc- please give details: <input type="checkbox"/> Other – please supply details:
Can you access (get on and off) the toilet/commode independently?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you have any equipment or support to help you?	
No <input type="checkbox"/>	If you do not use any equipment / support how do you manage getting on and off the toilet?
Yes <input type="checkbox"/>	What equipment/ Support do you use? <input type="checkbox"/> Grab rails <input type="checkbox"/> Toilet frame <input type="checkbox"/> Raised toilet seat <input type="checkbox"/> Self cleansing toilet (closomat – toilet that cleans and dries you) <input type="checkbox"/> Hoist <input type="checkbox"/> Help from Carer <input type="checkbox"/> Other – please give details:
Do you have any concerns about your personal hygiene?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If Yes – please give details:	
Do you use any equipment or support to help you with your personal hygiene? <input type="checkbox"/> No equipment/support <input type="checkbox"/> Carers <input type="checkbox"/> Equipment – please give details: <input type="checkbox"/> Other – please give details:	

Do you have any concerns about your continence?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If Yes – please give details: Highlight the specific difficulties and support required in this area	
Do you use any equipment or support to help you with your continence? <input type="checkbox"/> No equipment/support <input type="checkbox"/> Pads <input type="checkbox"/> Catheter <input type="checkbox"/> Commode <input type="checkbox"/> Urine Bottle <input type="checkbox"/> Sheath <input type="checkbox"/> Stoma Bag <input type="checkbox"/> Carers <input type="checkbox"/> Medication – please give details: <input type="checkbox"/> Other – please give details:	
Have you had an assessment for continence difficulties?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If Yes - please give details:	
Additional Comments:	
<p>Please be advised that some assessed services are means tested. This may mean that you have to contribute in part or in full to the cost of services that you may need following your assessment.</p> <p>Is the customer aware that they may be charged for services? Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>Do you wish to continue with this referral? Yes <input type="checkbox"/> No <input type="checkbox"/></p>	

SECTION 2 TRIAGE ASSESSMENT & OUTCOMES

Triage Officer Actions

	Date	Time	Method (Telephone/ E-mail/ text/ Other)	Contact Made Y/N	Worker name	Comments/ Action Required
Attempt 1						
Attempt 2						
Attempt 3						

Recommendations/ Rational of Decisions from Triage Officer:

In your opinion, how quickly do you feel a response is needed?

- ☐ Within 1 day
☐ Within 1 week

Why do you feel this is so urgent?

Assessment Cancelled

<input type="checkbox"/> No contact letter sent (Ensure you send a no contact letter)	Date letter sent:
<input type="checkbox"/> NFA Refusal (Ensure you send a refusal letter)	Date letter sent:
<input type="checkbox"/> NFA Information sent	
<input type="checkbox"/> NFA Advice Given	
<input type="checkbox"/> NFA Referral to Universal	

<input type="checkbox"/> NFA Inappropriate		
<input type="checkbox"/> NFA Deceased		
<input type="checkbox"/> NFA Moved out of area		
<input type="checkbox"/> NFA Referral to external organisation		
<input type="checkbox"/> NFA Other- please state		
Further Assessment		
<input type="checkbox"/> cause for concern/ repeated NFA referrals – requires follow up		
<input type="checkbox"/> Urgent Duty Visit Required		
<input type="checkbox"/> Safeguarding alert raised		
<input type="checkbox"/> Referral made to external agencies:		
<i>Organisation/ Service</i>	<i>Date</i>	<i>Contact Details</i>

☐ URGENT referral to team:

☐ ART
☐ VAT
☐ LDT
☐ MENTAL HEALTH
☐ REABLEMENT
☐ HOSPITAL TEAM
☐ CRISIS RESPONSE

Date:

Purpose:

☐ Re-assessment
☐ Review
☐ MIA Section 3 completed
☐ Carers Assessment
☐ Human Rights assessment
☐ Disability Assessment
☐ VI Rehab Assessment
☐ VI Initial Assessment
☐ HI Rehab Assessment
☐ Connect and Direct Appointment
☐ Other;

☐ Referral to team:

- ☐ ART
- ☐ VAT
- ☐ LDT
- ☐ MENTAL HEALTH
- ☐ REABLEMENT
- ☐ HOSPITAL TEAM
- ☐ CRISIS RESPONSE

Date:

Purpose:

- ☐ Re-assessment
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- ☐ MIA Section 3 completed
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- ☐ Human Rights assessment
- ☐ Disability Assessment
- ☐ VI Rehab Assessment
- ☐ VI Initial Assessment
- ☐ HI Rehab Assessment
- ☐ Connect and Direct Appointment
- ☐ Other;

HOSPITAL REFERRAL INFORMATION

Details of Hospital Admission (to be completed by Hospital Admin only)

Ward Name	
Date of Admission	
Estimated date of discharge	
Name of Consultant	
Reason for Admission:	
Diagnosis/Prognosis/Other health problems	
Has the person had frequent hospital admissions over the past 12 months? Yes <input type="checkbox"/> No <input type="checkbox"/>	
Has the person been screened for CHC?	Yes <input type="checkbox"/> No <input type="checkbox"/> Pull through from hosp section of contact form
If Yes, has a full CHC assessment been completed?	Yes <input type="checkbox"/> No <input type="checkbox"/> Pull through from hosp section of contact form
Summary of Customer's Needs	
Serious head injury has occurred	Yes <input type="checkbox"/> No <input type="checkbox"/>
Alcohol or drug abuse presents as a serious problem	Yes <input type="checkbox"/> No <input type="checkbox"/>
Person is terminally ill	Yes <input type="checkbox"/> No <input type="checkbox"/>
Person is distressed about going home or anxious about being in hospital	Yes <input type="checkbox"/> No <input type="checkbox"/>
Person is already in receipt of services from Adult Care	Yes <input type="checkbox"/> No <input type="checkbox"/>
Person is resident in a care home	Yes <input type="checkbox"/> No <input type="checkbox"/>
Person appears non-alert/confused/disorientated/lacking capacity	Yes <input type="checkbox"/> No <input type="checkbox"/>
Person has unexplained bruising/injuries or domestic violence has occurred	Yes <input type="checkbox"/> No <input type="checkbox"/>
Person has difficulty with any of the following tasks/activities:	

- Communicating	Yes <input type="checkbox"/> No <input type="checkbox"/>
- Mobilising	Yes <input type="checkbox"/> No <input type="checkbox"/>
- Eating/drinking	Yes <input type="checkbox"/> No <input type="checkbox"/>
- Toileting	Yes <input type="checkbox"/> No <input type="checkbox"/>
- Personal care	Yes <input type="checkbox"/> No <input type="checkbox"/>
Person is homeless	Yes <input type="checkbox"/> No <input type="checkbox"/>
Name of person completing S2 form	
Designation/Role	
Date of notification	
Name of Hospital	
Name of admin worker who inputted S2 form	

SECTION 3A Social Care Visit

Customer name:
PROTOCOL Number:
Check that we have correct personal details for the customer and amend as required.
Name of Worker:
Date of Screening:
I have had the assessment process explained to me and consent to this assessment. I am aware that other professionals from other agencies such as my GP, District Nurse and Health Providers may share this information. <input type="checkbox"/> Yes <input type="checkbox"/> No
Signed: (Customer / Assigned Person)*
Date:
*if not signed, please state reason why:
Is there anyone you would not consent to us sharing this information with? <input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, who?

To start the assessment first go through and verify info already gathered on Section 1 & 2

Physical and Mental Wellbeing		
Please tick any boxes that apply to the customer and comment;		Comments / Risk Factors
Depression		Give details of any specific difficulties the customer experiences in relation to any of the areas highlighted. Note that information inserted into this section will be pulled through into section 1 of the MACA
Dementia		
Confused/Disorientated		
Cognitive Problems/Memory loss		
Reactions to loss/bereavement		
Emotional Difficulties		

Other		
<p>Please summarise physical health needs from information collated in section one: Pull through text inserted here to section 1 of the MACA.</p> <p>Give detail of any specific physical health needs and how these needs affect the customer in their activities of daily life. Identify any support required to assist the customer in this area</p>		
<p>Does the customer lack capacity to make decisions over any aspect of their care, finances, treatment or safety? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't know</p>		
<p>If YES, please comment:</p> <p>Insert the detail of the specific decision relating to the customers lack of capacity</p>		
<p>Does anybody have Enduring/Lasting Power of Attorney of your property and finances? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't know If YES, please supply details below:</p> <p>Does somebody else have Lasting Power of Attorney in relation to your health and welfare? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't know</p>		
<p>If YES, please supply details below:</p> <p>Who has the power?</p> <p>Relationship to cared for:</p>	<p>Name:</p> <p>Address:</p> <p>Contact Details:</p>	

Is this customer approaching end of life? If yes then check for involvement with end of life services.		<input type="checkbox"/> Yes <input type="checkbox"/> No	
BEHAVIOUR			
Are there any behavioural needs that may cause a risk to self or others? If YES, please explain and indicate level of potential risk and to whom: <p style="color: red;">Give details about current concerns around risk and behaviour to self or others and also any relevant historical information</p>			
LOOKING AFTER YOURSELF DURING THE DAY			
Please tick any boxes that the customer needs assistance with and comment;		Comments / Risk Factors	
Physical Appearance		<p style="color: red;">Highlight the specifics of the needs identified opposite and the assistance required to meet these needs. Include whether the customer requires physical, verbal, emotional or psychological support with these issues, for example, verbal prompts to assist with dressing, or physical assistance required with bathing to ensure standard of cleanliness and hygiene is maintained.</p>	
Washing			
Bathing			
Toileting			
Dressing			
Oral Health			
Footcare			

Tissue Viability		
Mobility		
Continence		
Pain Management		
Any equipment and adaptations in the home		

ASSISTANCE DURING THE NIGHT

Please tell us about any assistance you need during the night?

Insert the reasons the support is required and what is involved. For example, the customer may wander at night and need constant monitoring, or the customer may need assistance with toileting during the night

EATING AND DRINKING

Please tick any boxes that apply to the customer and comment;		Comments/Risks
Need assistance to prepare food and drinks		Provide the detail of the need and what support is required to meet this
Need assistance with cooking		
Need assistance to eat my meal eg cutting up of food/ prompting to eat		
Have community meals		

Other issues with eating and drinking		
PRACTICAL ASPECTS OF DAILY LIVING		
Please tick any boxes that apply to the customer and comment;		Comments/Risks
Need assistance managing my money, budgeting and paying bills		Provide the detail of the need and what support is required to meet this
Need assistance with shopping		
Need assistance to do laundry and changing the bed		
Need assistance to clean my home		
Need assistance to deal with letters and form filling		
Need assistance with contacting appropriate people to carry out maintenance to my home and garden.		
COMMUNITY INVOLVEMENT		
Do you live alone?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
How do you manage getting out and about to engage in social and community activities e.g day clubs, church, cinema, friends etc? List the activities currently being undertaken and the support required to enable this to happen		
MAINTAINING RELATIONSHIPS WITH FRIENDS AND FAMILY		
Tell us about what assistance and support you need to keep in touch with friends, family and to socialise with other people.		

LEISURE, LEARNING AND WORK	
Are you employed?	<input type="checkbox"/> Yes <input type="checkbox"/> No
What are your leisure activities and hobbies? What help do you need to access these?	
COMMUNICATION	
Do you have any communication difficulties?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If Yes, is your communication difficulty to do with: 1. Hearing 2. Sight 3. Speech (disability/health related) 4. Other 5. Deaf/Blind (dual sensory)	Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes go to Hearing section below Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes go to Sight section below Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes go to Speech section below Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes go to Other section below Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes complete hearing and sight section below
Hearing	
Are you registered hearing impaired?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are you registered deaf?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you have a hearing aid?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you wear your hearing-aid?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Does your hearing-aid work?	Yes <input type="checkbox"/> No <input type="checkbox"/>
What is your preferred format for any future communication?	

- ☐ Text
☐ Email
☐ Letter
☐ Face to face
☐ Other- please give details:

Comments about your hearing difficulties:

Sight

Are you registered visually impaired?

Are you registered blind?

What is your preferred format for any written communication?

- ☐ Large print
☐ Audio CD
☐ Other - please give details:

Comments about your visual difficulties:

Speech

Please describe your speech impairment and how this affects you:

How would you like us to contact you in the future?

Other

What is your communication difficulty and how does this affect you?

First Language:	
Is an interpreter required?	Yes <input type="checkbox"/> No <input type="checkbox"/>
MANAGING RISK AND STAYING SAFE	
Please tick any issues that are applicable for the customer and comment.	
Are there any needs that may cause a risk to self?	Provide specific details of all aspects and concerns relating to actual and potential risks for the customer and others
Are there any needs that may cause a risk from others?	
Is the customer at risk of significant harm because of possible abuse or neglect? If yes, consider Safeguarding alert.	
Has the customer been subject to any previous risk of significant harm because of abuse or neglect?	
Is the customer at risk due to substance misuse?	
Is the customer at risk due to self harm?	
Are there any sensory difficulties that may impact upon safety?	
Has the customer had a Carelink/ Telecare assessment? <input type="checkbox"/> Yes <input type="checkbox"/> No	
If yes, what equipment do they have?	
Does the customer have a fire/ smoke alarm fitted?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you consider this person to be at risk from fire due to any of the following circumstances; Physical health, Mobility difficulties, Memory impairment, Mental health, Prescribed medication, Sensory impairment, or Learning disability Yes <input type="checkbox"/> No <input type="checkbox"/> <i>If Yes refer to GM Fire Service.</i>	
Bury Adult Social Care is helping people become more involved in the way they have their social care needs delivered - this is known as Self Directed Support (SDS) and gives the person much more choice, flexibility and control of their lives. Following further assessment you will know how much money is available to help you. We will then support you to create a plan and agree your personal budget. You can then be in control of how you spend the money on the support you need, rather than having to choose existing traditional services.	

Having explained this to you would you like have a further discussion and assessment with one of our staff to see if this is for you? / Would you like to complete the process so you know your indicative budget?

Decline ☐ Accept ☐

Has the CHC checklist been completed?

☐ Yes ☐ No

Customer Perspective (Needs and issues in the customers own words)

Provide specific details of all aspects and concerns relating to actual and potential risks for the customer and others

FACS Eligibility Screening Tool

Threshold set at CRITICAL

They need help to carry out all aspects of personal care or domestic tasks	
They need help to be involved in work, education, learning and in the community that is vital to their independence	
They need help to keep relationships vital to their independence	
They need help to keep family and other social roles and responsibilities vital to their independence	
They have experienced serious abuse or neglect	
They feel they have no choice and control over the world around them	
They have significant health problems	
Their life is at risk	

Threshold set at SUBSTANTIAL

They need help to carry out most personal care or domestic tasks	
------------------------------------------------------------------	--

They need help to be involved in many aspects of work, education, learning and in the community	
They need help to maintain most of their important relationships	
They need help to keep most of their family and other social roles and responsibilities	
They at risk of being abused or neglected	
They feel they have only partial choice and control over the world around them	
<u>Threshold set at MODERATE</u>	
They need help to carry out several personal care or domestic tasks	
They need help to be involved in several aspects of work, education, learning or in the community	
They need help to maintain several important relationships	
They need help to keep several family and other social roles and responsibilities.	
<u>Threshold set at LOW</u>	
They need help to carry out one or two personal care or domestic tasks	
They need help to be involved in one or two aspects of work, education, learning or in the community	
They need help to maintain important relationships	

In order to be eligible for social care services, an individual must meet at least one of the criteria in either the CRITICAL or SUBSTANTIAL domains ONLY.	
Does the customer meet Fair Access to Care Services (FACS)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p>Following an assessment of my needs, it has been explained to me that any services being offered to me may be subject to an assessment of my ability to contribute towards the cost of this service and that I may be visited by a Financial Assessment Officer.</p> <p>Tick <input type="checkbox"/> Yes <input type="checkbox"/> No please state if this has been explained to anyone else with the customer</p>	
Signed (Customer / Assigned Person) *	
*if not signed, please state reason why:	
Date:	
Has the customer been given a copy of the 'What do you think?' booklet? <input type="checkbox"/> Yes <input type="checkbox"/> No	

How satisfied have you been with the assessment process so far?

- ☐ Very satisfied
☐ Satisfied
☐ Dissatisfied
☐ Very Dissatisfied

Comments about the assessment process so far:

How clear are you about what will happen next?

- ☐ Very clear
☐ Clear
☐ Unclear
☐ Very Unclear

Comments about what will happen next

Insert agreed actions, who is responsible and the timescales involved in actions being completed

ACTIONS

Actions taken by Assessment Officer following completion of My Initial Assessment:

List the planned interventions following the assessment and provide details of who will complete each action and the timescales involved.

Outstanding actions to follow up:

List any further actions required in addition to those listed above

Name of assessing officer:

CUSTOMER OUTCOMES (to be completed by ACS staff)

- ☐ Assessment cancelled
- ☐ Cancelled/Client Died
- ☐ Cancelled/Client Moved
- ☐ Further Assessment
- ☐ New services offered but declined
- ☐ NFA- No (new) services offered or intended to be provided
- ☐ No new services offered or intended
- ☐ Some new services intended but not yet started
- ☐ Some or all services already started (including those started and finished)
- ☐ Other Sequel to Assessment

Client Category;

- ☐ Learning Disability - Autism Spectrum
- ☐ Learning Disability - Downs Syndrome
- ☐ Learning Disability - Mild
- ☐ Learning Disability - Moderate
- ☐ Learning Disability - Other, please state in details box
- ☐ Learning Disability - Severe
- ☐ Mental Health - Anxiety
- ☐ Mental Health - Dementia / Alzheimers
- ☐ Mental Health - Depression / Bipolar Disorders
- ☐ Mental Health - Korsekoffs Syndrome
- ☐ Mental Health - Obsessive Compulsive Disorder
- ☐ Mental Health - Other, please state in details box
- ☐ Mental Health - Phobias
- ☐ Mental Health - Schizophrenia / Personality Disorders
- ☐ Other Vulnerability - Other, please state in details box
- ☐ Other Vulnerability - Self Neglect
- ☐ Other Vulnerability - Vulnerable to Exploitation/Abuse
- ☐ Physical/Sensory/Frailty - Acquired Brain Injury
- ☐ Physical/Sensory/Frailty - Cerebral Palsy
- ☐ Physical/Sensory/Frailty - Difficulties with daily living tasks/mobility
- ☐ Physical/Sensory/Frailty - Dual Sensory Impairment
- ☐ Physical/Sensory/Frailty - Hearing Impairment
- ☐ Physical/Sensory/Frailty - Neurological Conditions, please state in details box
- ☐ Physical/Sensory/Frailty - Other, please state in details box
- ☐ Physical/Sensory/Frailty - Paraplegia/Quadriplegia/Hemiplegia
- ☐ Physical/Sensory/Frailty - Visual Impairment
- ☐ Substance Misuse - Alcohol
- ☐ Substance Misuse - Alcohol and Drugs
- ☐ Substance Misuse - Drugs

SECTION 3B

Disability Assessment Visit

Customer name:

PROTOCOL Number:

Name of Worker:

Date of Screening:

People present at assessment:

Go through and verify info already gathered on Section 1 and amend if required.

FACS Eligibility Screening Tool

Threshold set at CRITICAL

They need help to carry out all aspects of personal care or domestic tasks

They need help to be involved in work, education, learning and in the community that is vital to their independence

They need help to keep relationships vital to their independence

They need help to keep family and other social roles and responsibilities vital to their independence

They have experienced serious abuse or neglect

They feel they have no choice and control over the world around them

They have significant health problems

Their life is at risk

Threshold set at SUBSTANTIAL

They need help to carry out most personal care or domestic tasks

They need help to be involved in many aspects of work, education, learning and in the community

They need help to maintain most of their important relationships

They need help to keep most of their family and other social roles and responsibilities

They at risk of being abused or neglected	
They feel they have only partial choice and control over the world around them	
<u>Threshold set at MODERATE</u>	
They need help to carry out several personal care or domestic tasks	
They need help to be involved in several aspects of work, education, learning or in the community	
They need help to maintain several important relationships	
They need help to keep several family and other social roles and responsibilities.	
<u>Threshold set at LOW</u>	
They need help to carry out one or two personal care or domestic tasks	
They need help to be involved in one or two aspects of work, education, learning or in the community	
They need help to maintain important relationships	

In order to be eligible for social care services, an individual must meet at least one of the criteria in either the CRITICAL or SUBSTANTIAL domains ONLY.	
Does the customer meet Fair Access to Care Services (FACS)?	<input type="checkbox"/> Yes <input type="checkbox"/> No

I have had the assessment process explained to me and consent to this assessment. I am aware that other professionals from other agencies such as my GP, District Nurse and Health Providers may share this information. <input type="checkbox"/> Yes <input type="checkbox"/> No	
Signed: (Customer / Assigned Person) *	
Date:	
*if not signed, please state reason why:	
Are there any persons who you would not wish us to share this information with? <input type="checkbox"/> Yes <input type="checkbox"/> No	
If yes, please give details:	
Following an assessment of my needs, it has been explained to me that any services being offered to me may be subject to an assessment of my ability to contribute towards the cost of this service and that I may be visited by a Financial Assessment Officer. <input type="checkbox"/> Yes <input type="checkbox"/> No	
Signed (Customer / Assigned Person) *	
Date:	

*if not signed, please state reason why:	
Recommendation of Assessing Officer:	
Summary of identified needs/recommendation of Assessing Officer (in addition to info pulled through from S2C):	
<input type="checkbox"/> Referral to HIA Minor Adaptations (complete and attach in PROTOCOL HIA MINOR referral)	
<input type="checkbox"/> Referral to HIA Major Adaptations (complete and attach in PROTOCOL HIA MAJOR referral)	
<input type="checkbox"/> Referral to HIA Feasibility Study (complete and attach in PROTOCOL Feasibility Study doc)	
<input type="checkbox"/> Specification Document for Level Access Shower (complete and attach in PROTOCOL form)	
<input type="checkbox"/> Specification Document for Ramp (complete and attach in PROTOCOL form)	
<input type="checkbox"/> Specification Document for Stair lift (complete and attach in PROTOCOL form)	
<input type="checkbox"/> Specification Document for Closomat (complete and attach in PROTOCOL form)	
<input type="checkbox"/> Specification Document for Shower Over Bath (complete and attach in PROTOCOL form)	
<input type="checkbox"/> Specification Document for Through Floor Lift (complete and attach in PROTOCOL Form)	
<input type="checkbox"/> H2A Equipment Order (complete and attach in PROTOCOL form)	
<input type="checkbox"/> Bed Lever Risk Assessment (complete and attach in PROTOCOL form)	
<input type="checkbox"/> Chair/ Bed Raiser Spec (complete and attach in PROTOCOL form)	
<input type="checkbox"/> Closure Letter (complete letter and attach in PROTOCOL)	
<input type="checkbox"/> No Contact Letter (complete letter and attach in PROTOCOL)	
<input type="checkbox"/> Letter Requesting medical Information (complete letter and attach in PROTOCOL)	
<input type="checkbox"/> Consent letter to Obtain Medical Information (complete letter and attach in PROTOCOL)	
Customer Notifications:	
<input type="checkbox"/> Recommendations discussed with customer	
<input type="checkbox"/> Recommendations Letter (complete letter and attach in PROTOCOL)	
Assessing Practitioner:	
Job Title:	

Date assessment started:	
Date assessment completed:	
Assessment Outcome:	
<input type="checkbox"/> Assessment cancelled <input type="checkbox"/> Cancelled/Client Died <input type="checkbox"/> Cancelled/Client Moved <input type="checkbox"/> Further Assessment <input type="checkbox"/> New services offered but declined <input type="checkbox"/> NFA- No (new) services offered or intended to be provided <input type="checkbox"/> No new services offered or intended <input type="checkbox"/> Some new services intended but not yet started <input type="checkbox"/> Some or all services already started (including those started and finished) <input type="checkbox"/> Other Sequel to Assessment	

SECTION 3C Visual Impairment Assessment Visit

Customer name:

PROTOCOL Number:

Name of Worker:

Date of Screening:

Go through and verify info already gathered on Section 1 and amend as required.

Do you have a dual sensory loss? Yes No

Eye condition: (including treatment)

Visual Acuity: R/E

L/E

Hearing Loss details

Psychological support

☐ Yes

☐ No

If Yes, details:

FACS Eligibility Screening Tool

Threshold set at CRITICAL

They need help to carry out all aspects of personal care or domestic tasks	
They need help to be involved in work, education, learning and in the community that is vital to their independence	
They need help to keep relationships vital to their independence	
They need help to keep family and other social roles and responsibilities vital to their independence	
They have experienced serious abuse or neglect	
They feel they have no choice and control over the world around them	
They have significant health problems	
Their life is at risk	

Threshold set at SUBSTANTIAL

They need help to carry out most personal care or domestic tasks	
They need help to be involved in many aspects of work, education, learning and in the community	
They need help to maintain most of their important relationships	
They need help to keep most of their family and other social roles and responsibilities	
They at risk of being abused or neglected	
They feel they have only partial choice and control over the world around them	

Threshold set at MODERATE

They need help to carry out several personal care or domestic tasks	
They need help to be involved in several aspects of work, education, learning or in the community	
They need help to maintain several important relationships	
They need help to keep several family and other social roles and responsibilities.	

Threshold set at LOW

They need help to carry out one or two personal care or domestic tasks	
They need help to be involved in one or two aspects of work, education, learning or in the community	
They need help to maintain important relationships	

In order to be eligible for social care services, an individual must meet at least one of the criteria in either the CRITICAL or SUBSTANTIAL domains ONLY.	
Does the customer meet Fair Access to Care Services (FACS)?	<input type="checkbox"/> Yes <input type="checkbox"/> No

I have had the assessment process explained to me and consent to this assessment. I am aware that other professionals from other agencies such as my GP, District Nurse and Health Providers may share this information. <input type="checkbox"/> Yes <input type="checkbox"/> No

Signed: (Customer / Assigned Person)*

Date:

*if not signed, please state reason why:

Are there any persons who you would not wish us to share this information with? <input type="checkbox"/> Yes <input type="checkbox"/> No

If yes, please give details:

Following an assessment of my needs, it has been explained to me that any services being offered to me may be subject to an assessment of my ability to contribute towards the cost of this service and that I may be visited by a Financial Assessment Officer.

Signed (Customer / Assigned Person)*:

Date:	
-------	--

*if not signed, please state reason why:

Recommendation of Assessing Officer:

Summary of identified needs/recommendation of Assessing Officer:

Referral to: (Visual Impairment) <input type="checkbox"/> Action for Blind <input type="checkbox"/> Speakeasy <input type="checkbox"/> Low Vision Clinic <input type="checkbox"/> Bury Society for Blind and Partially Sighted People <input type="checkbox"/> Pipeline <input type="checkbox"/> Community Mental Health Team <input type="checkbox"/> Other (Specify)

Assessment Outcome

- ☐ Assessment cancelled
- ☐ Cancelled/Client Died
- ☐ Cancelled/Client Moved
- ☐ Further Assessment
- ☐ New services offered but declined
- ☐ NFA- No (new) services offered or intended to be provided
- ☐ No new services offered or intended
- ☐ Some new services intended but not yet started
- ☐ Some or all services already started (including those started and finished)
- ☐ Other Sequel to Assessment

SECTION 3D

Hearing Impairment Assessment Visit

Customer name:

PROTOCOL Number:

Name of Worker:

Date of Screening:

Go through and verify info already gathered on Section 1 and amend as required

Do you have a dual sensory loss? Yes No

Hearing Rehabilitation

Hearing loss- ☐ mild
 ☐ moderate
 ☐ severe
 ☐ profound

Type of hearing loss- ☐ sensori-neural
 ☐ conductive
 ☐ combined

Cause of hearing loss:

Age of onset:

Hearing aid (s)- ☐ Left ☐ Right
 ☐ NHS ☐ Private Date fitted:

Usefulness/insertion/controls:

Speech- ☐ normal ☐ intelligible ☐ unintelligible ☐ none

Tinnitus- ☐ mild ☐ tolerable ☐ severe
 ☐ occasional ☐ frequent ☐ constant

What does it sound like?

Onset- date it started

Advice re: tinnitus:
Referred to GP for referral to Tinnitus clinic <input type="checkbox"/> Yes <input type="checkbox"/> No
Communication
Advice given regarding hearing loss:
Information on hearing tactics and ways of coping:
Listening practice:
Environmental sounds:
One to one:
Environmental issues e.g. lighting, background noise
Lipreading- <input type="checkbox"/> skilled <input type="checkbox"/> average <input type="checkbox"/> poor <input type="checkbox"/> unable
Advice re lipreading/class/leaflet:
Specialist equipment tried: (see section 2C)
Abilities/interests/lifestyle

FACS Eligibility Screening Tool

Threshold set at CRITICAL

They need help to carry out all aspects of personal care or domestic tasks	
They need help to be involved in work, education, learning and in the community that is vital to their independence	
They need help to keep relationships vital to their independence	
They need help to keep family and other social roles and responsibilities vital to their independence	
They have experienced serious abuse or neglect	
They feel they have no choice and control over the world around them	
They have significant health problems	
Their life is at risk	

Threshold set at SUBSTANTIAL

They need help to carry out most personal care or domestic tasks	
They need help to be involved in many aspects of work, education, learning and in the community	
They need help to maintain most of their important relationships	
They need help to keep most of their family and other social roles and responsibilities	
They at risk of being abused or neglected	
They feel they have only partial choice and control over the world around them	

Threshold set at MODERATE

They need help to carry out several personal care or domestic tasks	
They need help to be involved in several aspects of work, education, learning or in the community	
They need help to maintain several important relationships	
They need help to keep several family and other social roles and responsibilities.	

Threshold set at LOW

They need help to carry out one or two personal care or domestic tasks	
They need help to be involved in one or two aspects of work, education, learning or in the community	
They need help to maintain important relationships	

In order to be eligible for social care services, an individual must meet at least one of the criteria in either the CRITICAL or SUBSTANTIAL domains ONLY.

Does the customer meet Fair Access to Care Services (FACS)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
-------------------------------------------------------------	----------------------------------------------------------

I have had the assessment process explained to me and consent to this assessment. I am aware that other professionals from other agencies such as my GP, District Nurse and Health Providers may share this information.
☐ Yes ☐ No

Signed: (Customer / Assigned Person)*

Date:

*if not signed, please state reason why:

Are there any persons who you would not wish us to share this information with?
☐ Yes ☐ No

If yes, please give details:

Following an assessment of my needs, it has been explained to me that any services being offered to me may be subject to an assessment of my ability to contribute towards the cost of this service and that I may be visited by a Financial Assessment Officer.

Signed (Customer / Assigned Person) *

Date:	
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*if not signed, please state reason why:

Recommendation of Assessing Officer:

Summary of identified needs/recommendation of Assessing Officer:

Referral to: (Hearing Impairment)

- ☐ Bury ASC Specialist SW
- ☐ Community Occupational Therapy
- ☐ Bury ASC Assessment and Reintegration Team (Disability)
- ☐ Day care
- ☐ Community Mental Health Team
- ☐ Physiotherapy
- ☐ Other (Specify)

Assessment Outcome

- ☐ Assessment cancelled
- ☐ Cancelled/Client Died
- ☐ Cancelled/Client Moved
- ☐ Further Assessment
- ☐ New services offered but declined
- ☐ NFA- No (new) services offered or intended to be provided
- ☐ No new services offered or intended
- ☐ Some new services intended but not yet started
- ☐ Some or all services already started (including those started and finished)
- ☐ Other Sequel to Assessment

This Section Is To Be Completed If You Have Someone That Cares For You.

Personal Details of Carer	
Name	
Address	
Postcode	
Contact Number(s)	
Email Address	
Date of Birth	

A Carer's Assessment is a conversation which aims to establish what services and support would be helpful in your particular situation. We have two types of Carers Assessment;

1. *My Initial Carers Assessment* – is used to gather some brief information about your caring role and offer you some information, advice and guidance, where required.
2. *Formal Carers Assessment* - is your opportunity to talk about your caring role in detail, how it affects your daily life and what support you need in the future.

Have you had completed the Initial Carers Assessment? Yes <input type="checkbox"/> No <input type="checkbox"/>
Have you had completed the Formal Carers Assessment? Yes <input type="checkbox"/> No <input type="checkbox"/>
If NO to either of these would you like either an; <ul style="list-style-type: none"> • Initial Carers Assessment Yes <input type="checkbox"/> No <input type="checkbox"/> • Formal Carers Assessment Yes <input type="checkbox"/> No <input type="checkbox"/>

Adult Care Services staff to ensure that Carers Assessments are completed as soon as possible if required.