



## Friends of St. John the Caregiver

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[www.FSJC.org](http://www.FSJC.org) • [www.YourAgingParent.com](http://www.YourAgingParent.com) • [www.CatholicCaregivers.com](http://www.CatholicCaregivers.com)

From *A Catholic Guide to Caring for Your Aging Parent*  
by Monica Dodds  
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### An Assessment Checklist for Family Caregivers

There are a few basics to keep in mind when making an assessment. First, remember that what you want to accomplish – to gather information so that you can really see the whole picture – isn't something that can be done in one sitting.

To make an assessment, use the following list of abilities and activities and:

1. Talk with your loved one about each item. This is getting information from your care-receiver's point of view and gives you a chance to form your own thoughts. Avoid the temptation to discuss (or argue about) what you are being told.
2. Later, on your own, review the information you have gathered and make a new list of the particular needs you identified with your care-receiver.
3. Go over the list of specific items and determine your loved one's degree of impairment by choosing the statement that best matches his or her ability in regard to each item:
  - My loved one can do this but needs a little help, takes longer, or requires some verbal or physical assistance.
  - My loved one cannot do essential parts of this and needs verbal and physical assistance.
  - My loved one cannot do this and needs someone to do it for him or her.
4. Research options for assistance, for both formal and informal support.
5. Again, sit down with your care-receiver and, item by item, plan how a need will be met and who can help him or her meet it.

#### The Overall Picture

Begin an assessment with a look at the overall picture.

##### *Physical:*

- Sleeping problems
- Weight gain or loss
- Smoking or drinking
- Problems with mobility
- Current medications
- Care-receiver's concerns about his or her own physical health

*Mental:*

- Short-term and long-term memory loss
- Confusion
- Poor judgment
- Inability to have a conversation
- Mood swings
- Recent losses
- Grief
- Care-receiver's concerns about his or her own mental health

*Emotional and Social:*

- Isolation
- Contact with family
- Contact with friends
- Leisure-time activities
- Negative view of life
- Care-receiver's concerns about his or her own emotional and social health

*Spiritual:*

- Parish involvement
- Mass attendance
- Reception of the sacraments
- Awareness of spiritual life
- Feeling of peace
- Care-receiver's concerns about his or her own spiritual health

**Activities of Daily Living**

Review the following lists and determine if your loved one can or cannot do the activities described.

*Eating:*

- Chew and swallow hot and cold food
- Swallow hot and cold beverages
- Cut food into digestible pieces
- Use eating utensils

*Bathing:*

- Get in and out of the shower or bathtub
- Turn on and off the faucet
- Regulate water temperature
- Wash body parts
- Dry the body
- Care for any special needs due to illness

*Grooming:*

- Take care of personal appearance
- Shave
- Wash and brush hair

Brush teeth and/or clean dentures

*Dressing:*

Choose clothes appropriate for the weather and the day's activities

Put on underwear, clothes, shoes, prostheses or assistive devices

Use buttons and zippers

*Mobility:*

Move from lying down to sitting

Move from sitting to standing

Reach a cane, walker, wheelchair

Move into position to use the toilet

Move into a wheelchair

Move out of a wheelchair

*Incontinence:*

Move fast enough to get to the bathroom

Need reminders

### **Instrumental Activities of Daily Living**

*Managing money:*

Handle money and pay bills

Use cash for simple transactions

Handle paperwork

Write checks or money orders

*Using the telephone:*

Place a call

Answer the phone

Understand and share information on the phone

Recognize and avoid telephone-related scams

*Preparing meals:*

Prepare hot and cold food

Discard items which have passed their "use-by" dates

Open containers

Use the stove, oven, microwave, toaster oven

Clean up after meals and put away food

Wash, dry, and put away dishes

*Doing laundry:*

Sort clothes

Carry laundry

Load the washer and dryer

Unload the washer and dryer

Put away clean clothes

Use coins if needed for machines

*Doing housework:*

- Sweep
- Clean the floor
- Vacuum
- Dust
- Clean up spills
- Clean the sink, toilet, bathtub
- Change bed linens
- Maintain a safe and clean environment

*Doing activities outside of the home:*

- Get to the bank
- Get to the post office
- Get to the store
- Get to the Laundromat
- Use stairs
- Use entrances and exits in houses or buildings
- Use transportation in all types of weather
- Get transportation
- Give directions to and from home
- Use proper personal safety when in public

*Managing health:*

- Understand directions from a doctor, nurse, therapist
- Use medical equipment
- Manage simple dressings
- Monitor blood pressure, pulse, temperature
- Manage medications

*Being alone:*

- Able to be left alone
- Recognize and react to emergencies
- Able to evacuate or tell someone that help is needed
- Exercise judgment regarding personal health and safety
- Often alone and isolated

For more free information, visit [YourAgingParent.com](http://YourAgingParent.com), a program of the Friends of St. John the Caregiver.

To receive a free copy of "The Little Book of Caregiver Prayers," send a self-addressed stamped envelope to: Friends of St. John the Caregiver, P.O. Box 320, Mountlake Terrace, WA 98043.