

## Assessing the **Situation**

**N**ow that your mom is older and living alone, you worry that she may fall or become ill with no one around to help. Your father has always prided himself on his appearance, but lately his clothes are not as clean and crisp as they once were and his grooming is poor. Your mother-in-law, who lives far away, is hospitalized for dehydration; she had been having only tea and toast once a day, and no one had realized it. Dad often repeats himself and cannot remember the word he wants to use. Is this normal memory loss, or could it be a sign of serious problems?

As parents grow older, adult children face changes they may not know how to address. They may support their parents' desire to continue living independently, but have concerns about their safety and well-being — and wonder where the line should be drawn. Fortunately, comprehensive assessment tools and professional consultants are available to help older people and family members decide when an older adult needs assistance.

### **The Goal of Assessment**

An assessment is a comprehensive review of a person's mental, physical, environmental, and financial condition to establish his or her ability to remain safely independent. It identifies risks and helps

determine options to reduce them. A thorough assessment will result in a comprehensive plan for meeting needs and addressing problems. The findings may help you decide whether change is necessary for your parents' safety and well-being, such as making new housing arrangements or getting in-home assistance. It also may lead to solving problems and allowing a parent to remain independent longer. A good plan can result in fewer accidents and illnesses, a longer life, an improved quality of life, and greater independence. It is also very important to include your parents in the discussion and decision-making about options.

While it is possible for families to complete assessments on their own using standard forms, there also are experienced professionals available who can help. Some hospitals and clinics offer geriatric assessment centers or evaluation units in which a medical/social work team looks at all aspects of an older person's health and life. The center will counsel your parent and you about the results, as well as offer practical assistance, such as linking you with local services and housing options. Individual geriatric care managers (also called case managers) provide similar services.

# Assessing the Situation

## What You Should Assess

Professional assessments can take from three hours to several days to complete, and even filling out a form with your parent can take considerable time. What factors should you assess? Although different forms and professionals will offer slight variations, a thorough assessment should include the following topics:

### ■ Physical health.

#### **Selected factors to assess:**

Diagnosed with any chronic diseases (for example, diabetes, high blood pressure, arthritis, emphysema)? Other illnesses (for example, bowel or bladder problems, heart disease, stroke, cancer)? Allergies? Fractures or trauma? Weight loss or gain? Incontinence? Balance problems? Skin growths or color changes? Persistent fatigue or sleeplessness? Swollen feet or legs, or limping? Vision problems (cataracts, use of vision aids)? Hearing problems? Dental problems (gum disease, strong breath, ill-fitting dentures)? Current vital signs. List of health professionals currently being seen. Recent hospitalizations?

### ■ Mental health.

#### **Selected factors to assess:**

Diagnosed with any psychiatric disorders (depression, anxiety disorder, psychosis)? Diagnosed with Alzheimer's or other dementia? Recent hospitalizations for any of the above problems? Alertness? Mood swings? Forgetfulness or wandering off? Confusion/disorientation? Sadness/loneliness? Decreased interest in reading, writing, and communicating? Maintaining friends? Interest in life?

### ■ Medication use.

#### **Selected factors to assess:**

All medicines taken (prescription or over-the-counter), with times per day and doses. Ability to take medications as directed and know how to avoid interactions. Barriers to proper medicine use (forgetfulness, expense, poor understanding of purpose or outcome of use).

### ■ Daily living.

#### **Selected factors to assess:**

Mobility or need for adaptive aids. Special dietary needs, favorite foods. Ability to dress, bathe, get up from a chair, use a toilet, use the phone, climb stairs, get help in an emergency, shop, prepare meals, do housework and yard work, drive safely.

### ■ Home and community safety.

#### **Selected factors to assess:**

Neighborhood. Home safety (hazards, adaptive aids, presence of smoke alarms). Ability to avoid telephone and door-to-door fraud. Yard and house maintenance.

### ■ Support system.

#### **Selected factors to assess:**

Names, addresses, and phone numbers of key family members, friends, and neighbors. Does your parent have frequent visitors or see friends? Does he or she go to a Senior Center? Get out of the house for other social reasons? Belong to organizations, including faith-based groups? Do family members live nearby?

■ **Appearance and hygiene.**

***Selected factors to assess:***

Overall appearance. Personal hygiene (brush teeth, trim nails, shave, wash and comb hair)? Clothes clean, and dressed appropriately?

■ **Finances.**

***Selected factors to assess:***

What insurance coverage is in place? Does insurance cover custodial care? What are your parents' total assets? Are there any legal documents such as trusts, living wills, and/or durable powers of attorney? Do your parents have a financial plan? How long will his or her assets last? Any sources of financial assistance? Does your parent pay bills on time and make informed financial decisions?

■ **Interests/lifestyles.**

***Selected factors to assess:***

Hobbies, reading preferences, favorite TV and radio programs, exercise, musical instruments played, languages spoken, favorite conversation topics, travel experience, important life events, religious/spiritual background, accomplishments, social activities.

AARP is a nonprofit, nonpartisan membership organization dedicated to making life better for people 50 and over. We provide information and resources; engage in legislative, regulatory and legal advocacy; assist members in serving their communities; and offer a wide range of unique benefits, special products, and services for our members. These include *AARP The Magazine*, published bimonthly; *AARP Bulletin*, our monthly newspaper; *Segunda Juventud*, our quarterly newspaper in Spanish; *NRTA Live and Learn*, our quarterly newsletter for 50+ educators; and our Web site, [www.aarp.org](http://www.aarp.org). We have staffed offices in all 50 states, the District of Columbia, Puerto Rico, and the U.S. Virgin Islands.



***The power to make it better.™***

601 E Street, NW  
Washington, DC 20049  
**[www.aarp.org](http://www.aarp.org)**

©2003 AARP. Reprinting by permission only.