Client Assessment: Getting to know your Client

The importance of assessment in residential care settings cannot be underestimated. It underpins the philosophical approach to person-centred care, an ideology that provides clients with greater control and responsibility regarding their own health and lifestyle.

Related: Person-Centred Care Defined

Why Do We Need to Assess Clients?

Every client entering residential care should be given a comprehensive assessment to identify individual needs, preferences, and strengths. The assessment is undertaken by an interdisciplinary team and covers various aspects of their lives such as: physical, spiritual, cognitive, social, mental, and emotional.

Client assessments lead to informed decisions that impact on care planning, resources allocation and other services.

The assessment process determines the most appropriate and effective way to support clients. Assessment usually starts soon after admission, however it depends on the organization and availability of staff.

Benefits of Conducting a Client Assessment

- Opportunity to get to know the client as an individual
- Establish areas of potential risk
- Ascertain a client’s preferences and needs
- Acknowledgement of cultural, religious, and ethnic values
- Advocate freedom of choice and independence

Who is involved in a Client Assessment?

A partnership between the interdisciplinary team and client is necessary to conduct a successful assessment.

Clients should be actively involved in their assessment as well as their family/caregivers and close friends. In many organizations a case manager is assigned to support clients during the assessment process.

Leisure and Health staff are responsible for the Social/Spiritual Care Plan that includes recreation, relaxation, community trips, club affiliation, and other aspects of daily life.
Channels for Identifying Client Needs

- Interviews with the client/caregiver
- Daily observation of activities
- Consultation with co-workers from different shifts
- Volunteers (if applicable)
- Nurses assistants, physiotherapists, psychologists, and other allied health practitioners
- Kitchen staff, gardeners, administration staff
- “Social and Cultural Profile” (given to client/caregiver to fill in)

Identification of Needs Defined

Staff should address the needs of clients and their families in a holistic way. This means that the assessment focuses on the whole person and their entire well-being, including physical, emotional, spiritual, mental, social and environmental.

The Social & Spiritual Profile collects a client’s personal as well as confidential information that the facility may or may not share in the future and therefore should have secure storage.

Gathering information may require more than one meeting with clients.
Some of the customary ways in which the needs are identified include:

- Client interview
- Family/friend interviews
- Observation data gathering

**Tips for conducting a Client Interview**

Be supportive and non-judgemental to encourage cooperation.

- Explain to clients what you are trying to find out and why.
- Try to find a common interest to talk about or break the ice by observing something in or around where the interview is taking place e.g. pictures on the wall, a piece of furniture, magazines etc.
- Listen attentively and let clients talk; you may find out things you never thought about asking.
- Enquire about past hobbies and current preferred entertainment.
- Gently support your clients to take responsibility for their own problems/needs.
- Assist clients to set realistic goals (priority goals, long-term or short-term goals?)

**Tips for Conducting Family/Friend Interviews**

Talking to family and friends may provide useful information about clients. Use discretion and be courteous.

- Establish current family’s dynamics and lifestyle.
- Encourage participation in facility’s activity programs (concerts, major events, and bus trips).
- Seek advice and recommendations regarding relative’s care preferences.
- Provide information about the range of activities and choices available through the recreation program.
- Liaise with family when developing care plan.
- Invite family to attend/join bi-monthly ‘Residents’ & Relatives Meeting’.
- Invite relatives to participate in ‘Family Council Meetings’ (if applicable), to share concerns.

Related: [Communication Strategies that Improve Client Engagement](#)

**Tips for Gathering Information through Client Observation**

- Observe client interactions with peers at meal times.
• Take note of verbal and non-verbal communication.
• Notice client’s mobility during the day e.g. able to sit down but needs assistance to stand up, unable to go to the toilet alone, able to drink from cup but not able to pour drink.
• Classify recreation assistance required e.g. supervision, escorting, extra support, wheelchair required.
• Consult other employees that come into contact with client e.g. domestic staff, gardeners, volunteers, Chaplains, and others

Some Useful Questions to Ask

• Explore what aspect of their profession they enjoyed.
• Find out what abilities clients have or lack that affects social/leisure activities? e.g.
  ○ Physical: mobility, dexterity
  ○ Sensory: vision/hearing impaired
  ○ Cognitive; attention span, behaviour, dementia status.
• Cultural background: would they like access to ethnic radio, special religious service, affiliation with clubs related to their background?
• Observe client personalities e.g. loners, extroverts, fun loving, melancholic.
• Seek recommendations from caregivers/clinical health providers regarding clients with specific needs (Alzheimer’s Disease, vision deficiency, emotional needs.)
• What type of activity is more suitable: active or passive?
• What hobbies/craft/music and other activities would appeal to them?
• What barriers, real or perceived, could affect social/leisure activities? E.g. unmet emotional needs, family estrangement, painful memories, mobility issues, depression, and other issues.
• What strengths do clients have? What remaining abilities can be improved upon?
• How can a client’s spiritual well being be supported?

Next Step: Developing a Care Plan

Before developing a care plan, it is important that staff communicate with other health practitioners to gather information outside the scope of their own roles e.g. behaviour management, psychological issues, and special dietary requirements amongst others.

Related: How to Write a Care Plan