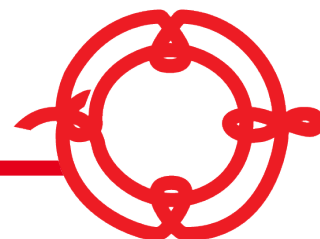


# Assessments

## Your guide to getting help and support in England



Local councils can offer you support if you're caring for someone, as well as care and support for anyone you're looking after. They can make decisions about the support they can provide by carrying out assessments.

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## Introduction

You may not see yourself as a carer, but if you're looking after a family member, friend or partner on a regular basis, it's important to know that you can get support. Local councils can provide care and support for people who provide care as well as those who are being looked after. To make a decision about the support they can provide, they carry out assessments.

In this factsheet, we will explore what assessments are, the different types, how to request them and how they can help.

An assessment could be a review of your needs as a carer or the needs of someone you're looking after depending on the type of assessment it is. They are certainly not a test of your abilities or the quality of care you are giving.

### **They are designed to find out about:**

- the amount and type of care you're giving (or intend to give)
- your needs as the carer and the person you're caring for
- whether you meet the eligibility criteria for help and support from the local authority.

Some people worry that they will be judged when having an assessment, but this is not what they are for. Their purpose isn't to add to your challenges but to provide help and support. We'll also cover what happens if you move to another area, someone's needs change or you need to challenge a decision.

## A carer's assessment – for adult carers of adults who need support

### Stage 1 – What support do you need?

According to the Care Act 2014, a carer's assessment in England is for anyone who is over 18 years old with caring responsibilities for another adult. The adult or adults you're looking after might have a long-term illness, condition, disability or needs relating to their age.

It is an opportunity to record the impact caring has on your life and what support or services you need. The assessment will look at, for example, your physical, mental and emotional needs, and whether you are able or willing to carry on caring.

### Who can have a carer's assessment?

Anyone with caring responsibilities who appears to have a need for support can have an assessment arranged by the local council. It is important to note that this is the local council of the person you are caring for, not your own local council if you live in a different area.

As a carer, you will be entitled to an assessment regardless of the amount or type of care you provide, your financial means or your level of need for support. You can still have an assessment if the person you care for has had a needs assessment (see page 11), or if the local council have decided they are not eligible for support.

If you and the person you care for agree, a combined assessment of both your needs can be carried out at the same time. If you are sharing caring responsibilities with another person, or more than one person, including a child under 18, you can each have a carer's assessment.

You don't necessarily have to live with the person you are looking after or be caring full-time to have a carer's assessment. For example, you may be juggling work and care and finding this is having a noticeable impact on your life.

### How do you arrange a carer's assessment?

If you have not been offered a carer's assessment, you can contact the adult social care team of your local council and ask for one. If the person you care for lives in another area, you will need to contact their council. Alternatively, you could ask for a review of your support plan (if it has been a year since your last one, or less than a year but your circumstances have changed). If you want to, you can ask for an assessment before you take up your caring role.

We would recommend contacting them in writing or online, if you can, so that you can follow this up and refer to a record if you need to.

Something to bear in mind is that if you decide to request an assessment over the phone, there will not be a paper trail of the request to refer to. It's often helpful to make a note of dates, times and people you've spoken to before, during and after assessments. We have an assessment tracker at the end of this guide you could use to keep track of these details.

We have also provided a link to where you can find helpful template letters, including one you could use to request a carer's assessment at the end of this guide (produced by Access Social Care).

### How can you prepare for a carer's assessment?

Allowing yourself some time to think about how caring affects you may help you feel more prepared for the discussion. It's important to start thinking about any help that would make a difference to you as a carer.

For a list of questions that should give you a clear idea of the help you may need and a diary tool that will help you review how much time you are spending caring, see the section at the end of this guide.

Understandably, you might not know what forms of help are available. The role of the assessment is to help the local council understand any issues or problems you're facing. As part of the process, they should give you information about the assessment in advance – for example, a list of the questions they will ask.

They may give you a form to write down your thoughts to these questions before the carer's assessment. Often, this is referred to as a self-assessment questionnaire. Alternatively, you may find it helpful to write some notes for yourself and talk to family or friends to help you think about your needs. We have added some questions along with resources to help you prepare at the end of this guide.

### How is a carer's assessment carried out?

A trained professional from the local council will usually carry out the assessment. In some areas, a professional from a local organisation, such as a carers' organisation, may be able to undertake one for you. Your rights remain the same in this situation, and the local council still has the ultimate responsibility for any decisions made.

If the assessment involves a meeting, it should be carried out in a convenient and private place. Meetings are likely to be part of the process if the person you care for is having an assessment as well. You can choose whether the person you care for is present or not, depending on whether you feel this is appropriate. If it helps, you can have a family member, a friend or a carer support worker from a carers' organisation with you.

Although assessments are usually carried out in person, they can also be done over the phone or online, depending on your preference. Some people find it easier to express their needs over the phone or online, but others will prefer communicating in person. Let them know in advance if any adjustments are needed, especially if you have a condition or disability.

It may be helpful for you to write notes about what was discussed and explained immediately after the meeting so that you have a record.

The local council may carry out a supported self-assessment. This would involve you filling in a self-assessment questionnaire, and then being contacted by the local council to discuss what you have written on the form.

The assessment will consider your situation and whether your caring role affects your health and key areas of your life, from staying in work to having a social life. As indicated in the [Care Act](#), it should cover how you can be supported to manage your caring responsibilities by looking at:

- your caring role and how it affects your life and wellbeing
- your health – physical, mental and emotional issues
- your feelings and choices about caring
- work, study, training and leisure
- relationships, social activities and your goals
- housing
- planning for emergencies (such as a carer emergency scheme) – the local council should be able to tell you more about what they can do to help you plan for an emergency.

You should be asked about these considerations; if not, you can raise them yourself. The aim of the assessment is to help you get the support that you need so it's best to give your honest opinion about your caring role, the care you provide and your feelings about being a carer.

To help you think about this, there are questions you can consider in advance that are listed at the end of this guide. For further ideas, you can also find details about different areas of support available here: [Social care and support guide - NHS](#).

Remember that the law is on your side. The law under the Care Act 2014 says that all assessments must be carried out in a manner that:

- is appropriate and proportionate to your needs and circumstances
- ensures that you are able to participate effectively in the assessment
- has regard to your choices, wishes and the outcomes you want to achieve
- takes account of the level and severity of your needs.

## Having an independent advocate

The local council must provide you with an independent advocate to assist you during the assessment process (and afterwards) if:

- without support, you would have ‘substantial difficulty’ in communicating your wishes or understanding, retaining and assessing information during the assessment and
- there is no other appropriate person who is able and willing to help you.

## Where can I find an independent advocate?

You could start by [contacting your local council](#) to find out whether the adult social services team has any information about advocacy services. Or you could contact advocacy charities such as [POhWER](#) or [Voiceability](#).

You could also see if a local carers’ organisation could recommend any reliable sources of advocacy support in your area. Our local directory might help you find out their contact details: [Support where you live | Carers UK](#).

## Stage 2 – Looking at your needs

### How will the local council decide if your needs as a carer are eligible for support?

The national rules for deciding who is eligible for care and support are determined by the Care Act 2014. However, local councils still need to make the decision about whether your needs meet the rules and are therefore what the law calls 'eligible needs'. You should meet the eligibility criteria if there is likely to be a significant impact on your wellbeing as a result of your caring role. There are three main questions the local council will have to consider in making their decision:

- Are your needs the result of you providing necessary care?
- Does your caring role have an effect on you?
- Is there, or is there likely to be, a significant impact on your wellbeing?

If the answer to all three questions is yes, you will have eligible needs. These questions are explained in more detail below.

### Are your needs the result of you providing necessary care?

The local council could decide that the care you provide is not necessary, and that the person you care for could do the things you do themselves. This is why it's important for the person you are caring for to have an assessment of their needs too – to ensure that their capabilities and needs are also fully understood.

Alternatively, they could decide that your needs or problems are the result of something other than your caring role.

### Does your caring role have an effect on you?

The effect on you must be either:

- your physical or mental health is at risk of getting worse, or
- you are unable to achieve at least one of the following outcomes:

- look after any children you have responsibilities for
- provide care to any other person
- maintain your home in a fit and proper state
- eat properly and maintain proper nutrition
- maintain and develop your relationships with family and friends
- take part in any education, training, work or volunteering you wish to
- time for social activities, hobbies, etc.

When considering whether you can achieve the above outcomes, the law states that the local council must take into account any difficulties you have. You will be considered unable to achieve the outcome if you:

- need assistance to achieve the outcome
- can achieve the outcome unaided but experience significant pain, distress or anxiety
- can achieve the outcome unaided but doing so endangers, or may endanger, your health and safety or another person's.

### Is there, or is there likely to be, a significant impact on your wellbeing?

'Wellbeing' is defined in the [Care Act](#). The definition is very broad and includes things like social and economic wellbeing, personal dignity, control over your day-to-day life, participation in education, work or social activities, relationships with other people, having suitable accommodation, and protection from abuse and neglect.

'Significant' is not defined in law and so it should be given its everyday normal meaning. If you think the effect on you is noticeable or important, this could count as significant. Although the Care Act does not define what counts as a significant impact on your wellbeing, it does list a number of considerations that the local council must take into account. These are:

- you are best placed to judge your wellbeing
- your views, wishes, feelings and beliefs should be considered



- the importance of reducing existing needs, and preventing or delaying the development of needs
- decisions should be based on your circumstances, not assumptions about you
- you should be able to participate as fully as possible in decision making
- the needs of the carer and the person being cared for need to be balanced
- the need to protect people from abuse and neglect
- any restrictions on rights or freedoms should be kept to the minimum possible.

If your level of need varies, the local council must take this into consideration to gain a full picture of your level of need.

The reason for the variation is not important; it could be because the condition of the person you care for fluctuates from day to day or week to week, or because you have other responsibilities that can affect you from time to time.

### **Stage 3 – What help you might get after a decision is made**

#### **If you do have eligible needs**

If the local council decides that you do have eligible needs, they have a legal obligation to meet these needs (providing you want them to) and must draw up a support plan detailing how these needs will be met. It may be agreed that the best way to help you as a carer is by providing services directly to you, providing services to the person you care for, or a combination of both.

The local council can provide services themselves or arrange services through another organisation. Alternatively, you or the person you care for can request direct payments. These are payments that enable you to buy services to meet your eligible needs. For more information on direct payments, see our information page: [carersuk.org/directpayments](https://carersuk.org/directpayments).

The local council may or may not charge you for carer support. If they do, they must carry out a financial assessment to work out whether you have to make a contribution and if so, how much. If the help you are offered is free, the local council does not have to carry out a financial assessment. For more information, see page 37.

### If you don't have eligible needs

If the local council decides that you do not have eligible needs, they must give you a written decision explaining this. You should also be given advice and information about what could be done to prevent or reduce your needs from increasing either now or in the future. This advice and information should be based on your specific circumstances. For example, you might be given details about specialist counselling support in your area or local agencies that can offer respite support or services such as prepared meals brought directly to the home.

►► **Note:** Following a carer's assessment, some local authorities can charge for care and support services. Your local authority will carry out a financial assessment to see whether it's appropriate for you to make a contribution, which will depend on your circumstances. For more information, see the section about 'Charging' on page 37.

### What does a support plan look like?

How this will look will vary from council to council, but it should include:

- details of any needs identified in the assessment
- which needs meet the eligibility criteria
- which needs the local council is going to meet, and how
- the outcomes that you want to achieve
- information about the personal budget available (the amount of money that the local council has worked out it will cost to arrange the necessary support for you)
- information about direct payments

- information and advice to support you in your role as a carer and address your needs.

Some examples of what could be provided to help you as a carer if you are eligible for support:

- help with transport costs, such as taxi fares or driving lessons
- costs for a car where transport is crucial, such as repairs and insurance
- technology to support you, such as a mobile phone or a computer where it is not possible to access computer services elsewhere
- help with housework or gardening
- help to relieve stress, improve health and promote wellbeing such as gym membership.

Some examples of what could be provided for the person you care for, to help you as a carer:

- changes to their home to make it more suitable
- equipment such as a hoist or grab rail
- a care worker to help provide personal care at home
- a temporary stay in residential care/respice care
- meals delivered to their home
- a place at a day centre
- assistance with travel, for example to get to a day centre
- laundry services
- replacement care so you can have a break.

▶▶ **Note:** If help is offered for the person you care for, they will be financially assessed to see if they need to contribute to the cost.

## A needs assessment – for adults who need support

### Stage 1 – What are their needs?

A needs assessment is for adults (18 years and over) who may need help because of a disability, ill health or old age. This is free and any adult with extra needs (or you on their behalf) can ask for one. Local councils have a legal duty to assess an adult who appears to have care and support needs. For further details, see the [Care Act 2014 legislation](#).

Under the [Care Act](#), the local council has a clear duty to consider a person's physical, mental and emotional needs, including:

- the person's needs and the impact these needs have on their care
- the things that matter to the person, for instance, help with getting dressed or support to get to work
- the person's choices and goals (if they wish to take up a new activity or maintain relationships, for example) and preferences for their day-to-day care
- the types of services, information, advice, facilities and resources that can prevent or delay further needs from developing, helping the person recover or stay well for longer (for example, the local council may offer the person a period of reablement to reduce their needs and regain skills, before completing the assessment)
- the needs of the family of the person who's having the assessment.

### Who is entitled to a needs assessment?

If someone appears to have care and support needs, their local council has a duty to assess them, as mentioned above. It doesn't matter what the person's level of need is or their financial resources. Even if you are providing all the care you think the person requires, they are still entitled to a needs assessment. As a carer, you can be involved in the assessment if the person you care for wishes you to be.

### How do you prepare for a needs assessment?

If appropriate, it might be useful for you and the person you care for to take some time to think about their physical, mental and emotional needs, including their goals, wishes and preferences. You could list these or note

them down in advance to help you feel more prepared during the meeting. You could consider:

- examples of their care and support needs
- what's important to them, ie, help to get to work or dressed
- their goals and choices to maintain relationships or engage in new interests or activities
- what services, advice or support you both feel would help prevent their needs becoming greater
- the needs of any family members or partners.

Towards the end of this guide, you can find some helpful aids and resources that we've developed to help you prepare for a needs assessment in advance including:

- A link to guidance offered by Access Social Care
- 'All about the person I'm caring for' reference sheet
- A carer's diary
- 'What I have applied for' tracker.

## How is a needs assessment carried out?

If the person you care for has not been offered an assessment, you could contact the adult social care services department of their local council by phone, in writing or online and ask for one. See our tools at the end of this guide to help you keep track of appointments and contact information.

The assessment meeting is usually carried out by a social worker or another trained professional.

Assessments can be carried out face to face, over the phone or online. The person you care for might want to express their thoughts alone or they might need support to express their views or feelings in the presence of a family member, a friend, an advocate or a support worker.

Something to bear in mind is that if you decide to have an assessment over the phone, there will not be a paper trail of the conversation to refer to. It could be very helpful to take notes or ask someone else to.

In some areas, the local council will ask local organisations to carry out the assessments, but arrangements should still be made through the local council. The local council should explain who will carry out the assessment.

Where someone has particularly complex needs, an assessor with specialist expertise or knowledge should be involved. For example, the assessor should have an understanding of autism if the person being assessed has autism. This is a legal requirement and can be challenged if necessary. Mencap has produced a template letter that can be used if you are not satisfied: [mencap.org.uk/search?search=specialist+assessor](https://www.mencap.org.uk/search?search=specialist+assessor).

If the person you care for can make their own decisions, they can decide to carry out a self-assessment if they wish. The local council will still be involved to help support the process, and to help the person identify all of their needs. The law says that local councils should enable the person being assessed to have their needs and wishes heard, for example by allowing as much contact with the local council as needed.

## Independent advocate

The local council must provide the person you care for with an independent advocate to assist them in the assessment process (and after) if:

- without support they would have ‘substantial difficulty’ in communicating their wishes, or understanding, retaining and assessing information during the assessment and
- there is no other appropriate person who is able and willing to help them.

## Where can I find an independent advocate?

There are several different options. You could [contact your local council](#) to find out whether the adult social services team has any information about advocacy services. Or you could see what advocacy support specialist charities such as [POhWER](#) or [Voiceability](#) can offer. Some people have found that their local carers’ organisation is a good source of information for advocacy services in their area. Our local directory might be a helpful starting place: [Support where you live | Carers UK](#).

## Stage 2 – Looking at whether the adult's needs are eligible for support

How will the local council decide if the adult I am caring for is eligible for their support?

The local council should review the needs of the adult in relation to the [Care Act 2014](#). This provides national rules to help them decide whether they would be eligible for additional care and support. Importantly, the fact that an adult's needs might be currently being met by a carer is irrelevant when deciding if they meet the eligibility criteria.

There are three main questions the local council will have to consider in making their decision:

- Does the person you care for have care and support needs as a result of a physical or mental condition?
- Due to care and support needs, is the person you care for unable to achieve or meet two or more desired goals or outcomes?
- Is there, or is there likely to be, a significant impact on the person's wellbeing?

If the answer to all three questions is yes, the person you care for will have eligible needs for care and support. These questions are explained in more detail on the following pages.

### Does the person you care for have care and support needs as a result of a physical or mental condition?

This can include physical, mental, sensory, learning or cognitive disabilities or illnesses, substance misuse or brain injury. There is no need for a formal diagnosis.

## Due to care and support needs, is the person you care for unable to meet two or more desired goals or outcomes?

The desired goals or outcomes are:

- eat properly and maintain proper nutrition
- maintain personal hygiene
- manage toilet needs
- dress appropriately
- able to use and move about the home safely
- maintain their home in a fit and proper state
- maintain and develop relationships with family and friends
- take part in any education, training, work or volunteering
- be able to participate in social activities, hobbies and make use of public transport and local services
- look after any children they have responsibilities for.

When considering whether a person can achieve the above outcomes, the law states that the local council must take into account any difficulties they have. They will be considered unable to achieve the outcome if they:

- need assistance to achieve the outcome
- can achieve the outcome unaided but experience significant pain, distress or anxiety
- can achieve the outcome unaided but doing so endangers, or may endanger, their health and safety or another person's
- can achieve the outcome with assistance, but it takes significantly longer than would normally be expected.

## Is there, or is there likely to be a significant impact on the person's wellbeing?

'Wellbeing' is defined in the [Care Act](#). The definition is very broad and includes personal dignity; control over your day-to-day life; participation in education, work or social activities; relationships with other people; having suitable accommodation; and protection from abuse and neglect.



‘Significant’ is not defined in law, and so should be given its everyday, normal meaning. If you think the effect is noticeable or important, this could count as significant. Although the Care Act does not define what counts as a significant impact on wellbeing, it does list what the local council must take into account when considering the issue, including:

- the adult is best placed to judge their own wellbeing
- the adult’s views, wishes, feelings and beliefs
- the importance of reducing existing needs, and preventing or delaying the development of needs
- decisions should be based on the adult’s circumstances, not assumptions about them
- the adult is able to participate as fully as possible in decision making, balancing the needs of the carer and the person being carer for
- the need to protect people from abuse and neglect, ie what to do if you are worried that a vulnerable person is at risk of harm or neglect
- any restrictions on a person’s rights or freedom should be kept to the minimum possible.

If the adult’s level of need changes because of their condition (for example, if there are days when tasks can be completed and days when they cannot), the local council must take this into consideration to gain a full picture of the adult’s level of need. The diary tool, that’s referenced at the end of this guide, may help with this.

### **Stage 3 – What help they might get after a decision about their needs**

#### **If the person you care for does have eligible needs**

If they agree, the local council will draw up a care and support plan detailing how these needs will be met. These will differ from council to council. See page 54 of this helpful guide for a useful [example of a care and support plan](#).

If their needs are already being met in some way, the local council do not have to meet those particular needs, but they should still be recorded in the care and support plan.

As a carer, you are entitled to be involved in this process if the person you care for agrees. The local council cannot lawfully assume that you will continue to meet the person's needs. Therefore, it is important for you to be clear about the level of care you are willing and able to provide.

If the eligible needs of the person you care for are not already being met in some way, the local council has a legal obligation to help meet these needs. The local council can provide services directly, or they can arrange them through another organisation. This page on the NHS website has some suggestions about what social services can offer: [Social care and support guide - NHS](#).

Alternatively, the person you care for might request direct payments. These are payments that can enable them to buy services to meet their eligible needs. For more information on direct payments, see our information page: [carersuk.org/directpayments](https://carersuk.org/directpayments).

Unless the recommended service is one that the local council provides free of charge, they must carry out a financial assessment to work out whether the person you care for could make a contribution, and if so, how much. For more information, see page 37.

### If the person you care for doesn't have eligible needs

If the local council decides that the person you care for does not have eligible needs, they must provide:

- a written decision explaining this
- advice and information about what could be done to prevent or reduce their needs from developing, based on their circumstances. This could be details about specialist counselling support in your area or local agencies that can offer respite support or services, such as prepared meals brought directly to the home.

►► **Note:** Some local councils will charge for services they provide, but this will only be agreed following a financial assessment and would depend on the individual's circumstances. See page 37 for more details.

The care and support plan must include:

- details of the needs identified in the assessment
- which needs meet the eligibility criteria
- which needs the local council is going to meet, and how
- the outcomes that the person you care for wants to achieve
- the personal budget available (the amount of money that the local council has worked out it will cost to arrange the necessary care and support for them)
- information about direct payments
- information and advice on what can be done to reduce their needs, and to prevent or delay needs from developing in the future.

Some examples of the kind of help that could be available to support the person you care for:

- changes to their home to make it more suitable
- equipment such as a hoist or grab rail
- a care worker to help provide personal care at home
- a temporary stay in residential care/respite care
- meals delivered to their home
- a place at a day centre
- assistance with travel, for example to get to a day centre
- laundry services
- replacement care so you can have a break.

## **A parent carer needs assessment – caring for a ‘child in need’**

If you have a child who depends on you for extra support (or more than one child with needs), you may find it helpful to have a parent carer needs assessment.

### **Who is a parent carer?**

A parent carer is someone over 18 who provides care for a disabled child (under 18) for whom they have parental responsibility.

### **What is a parent carer needs assessment?**

If you request support for looking after a child who has extra needs, your local council has a legal obligation to offer to assess you as a parent carer on the basis of need. This is according to the Children and Families Act 2014. A parent carer needs assessment can be carried out at the same time as an assessment for the disabled child (by the same assessor) if preferred. The local council must also be satisfied that the child and their family come within the scope of the Children’s Act, ie that the child is a child in need.

### **Who can have a parent carer needs assessment?**

If you are 18 or over and have parental responsibility for a disabled child (under 18), you may be entitled to a parent carer needs assessment. The local council must consider this to be a ‘child in need’ as defined by the Children’s Act 1989.

#### **A ‘child in need’ is defined as:**

- a child who is unlikely to achieve or maintain, or to have the opportunity of achieving or maintaining, a reasonable standard of health or development without the provision of services by a local authority
- a child whose health or development is likely to be significantly impaired, or further impaired, without the provision of services

- a child who is disabled.

You can read more here: [www.legislation.gov.uk/ukpga/1989/41/section/17](http://www.legislation.gov.uk/ukpga/1989/41/section/17)

## How do you arrange a parent carer needs assessment?

As a carer, you should be offered an assessment by your local council's child social services department.

If you have not been offered one, you can contact them by phone, in writing or online, and ask for a 'parent carer needs assessment'. It's important to bear in mind that if you request an assessment by phone, you won't have a paper trail. We would recommend keeping a note of dates, times and people you've been in touch with before, during and after the assessment. We have created some resources you can use to help you keep track of who you contact and when – see the end of this guide.

## How do you prepare?

To prepare for your assessment, it is useful to give yourself some time to think about how caring affects you. It's also important to start thinking about any help that would make a difference to you as a carer. This will help when you discuss things that the local council will have to consider when doing a parent carer needs assessment.

You can find some tools to help you prepare at the end of this guide including questions to consider and a diary.

Bear in mind that you might not know about all the types of help that could be available; the assessment is to help the local council understand what things you need support with. You may find it helpful to write some notes for yourself and talk to family or friends to help you think about your needs.

## Have a checklist

It may also be helpful to provide evidence of the information you are providing in the assessment such as:

- medical diagnosis information – though a diagnosis is not a requirement to get an assessment or support
- details of medical appointments

- a statement from your GP about support your child may need to manage their condition(s) and consequences if that support is not available
- a statement from school if they have information to add you feel is helpful
- a copy of the child's Education, Health and Care Plan (EHCP) if they have one
- statements from any family and friends who are not involved in the assessment, but have relevant information about the needs of your child
- details of any care that is already being given by family and/or friends – all needs whether met or not must be recorded in the assessment
- real-life examples of the consequences of their needs not being met, eg safety issues in the home due to not having specialist equipment.

## What should happen during an assessment?

The assessor should review:

- the wellbeing of the parent
- whether the parent has needs for support and what those needs are
- whether it is appropriate for the parent to provide, or continue to provide, care for the disabled child in the light of the parent's needs for support, other needs and wishes
- the need to safeguard and promote the welfare of the child who is being cared for, and any other child for whom the parent carer has parental responsibility.

Any services to be provided for parent carers of disabled children can be included in a child's Education Health and Care plan, if the child has one.

## After the parent carer needs assessment

Once completed, the information gathered during the assessment must be reviewed and the local authority will decide whether you meet the eligibility criteria for support services.

## If you are eligible

If you are eligible for support, a care plan should be written, which should explain the following:

- what support you need
- how that support will be provided
- who will provide that support – eg social services, outside agencies
- the desired outcomes of the support being provided
- how long you will need these services
- when the care plan will be reviewed.

For further information about care plans, [see the NHS guide](#).

## What kinds of services or support might be offered?

The support provided will be specific to your needs but can include:

- emotional support
- short breaks
- training to help with caring such as ‘safe lifting’
- information about local support groups
- advice about benefits you may be eligible for
- help with transport costs, such as taxi fares or driving lessons
- costs for a car where transport is crucial, such as repairs and insurance
- technology to support you, such as a mobile phone or a computer where it is not possible to access computer services elsewhere
- help with housework or gardening
- help to relieve stress, improve health and promote wellbeing, such as gym membership.

Any services to be provided for parent carers of disabled children can be included in a child’s Education Health and Care plan, if the child has one. Find out more at: [www.ipsea.org.uk/faqs/ehc-plan-quick-guide](http://www.ipsea.org.uk/faqs/ehc-plan-quick-guide).

## If you are not eligible

If the local council decides that you do not have eligible needs, you must be given a written decision explaining this. You should also be given advice

and information about what could be done to prevent or reduce your needs either now or in the future. This could be specialist counselling support in your area or local agencies that can offer respite support or services, such as prepared meals brought directly to the home. This advice and information should be based on your specific circumstances.

Please note, you can complain about this decision if you feel it is incorrect; you can find information if you wish to challenge a decision or make a complaint later in this guide.

### **Can I still have an assessment if I'm not their parent?**

Carers of a disabled child who do not have parental responsibility for the child (such as a grandparent or extended family member) would not have the same rights to an assessment that a parent would have.

Neither the Care Act nor the Children and Families Act provide a new right to a standalone carer's assessment for non-parent carers of disabled children under 18.

However, non-parent carers can request a carer's assessment under the law that existed before the Care Act and the Children and Families Act. This means that non-parent carers will need to be 'providing or intend to provide substantial and regular care' to have a legal right to request a carer's assessment [under The Carers (Recognition and Services) Act 1995].

### **A Children's Act assessment – support for a 'child in need'**

#### **What is a Children's Act or 'child in need' assessment?**

These are designed to offer support for children in need. Assessments for disabled children are carried out under the Children Act 1989 in England. This means that local councils have a duty to assess a 'child in need' under the age of 18 for any services that they or their family may need – see pages 20-21 for the legal definition of a 'child in need'. You may also hear about an early intervention called 'Early Help', which is available for children up to the age of 18. There is more detailed information here which



can help you decide whether it is suitable for your child:

[youngminds.org.uk/parent/parents-a-z-mental-health-guide/early-help-and-early-intervention-services/](https://youngminds.org.uk/parent/parents-a-z-mental-health-guide/early-help-and-early-intervention-services/).

## What does a 'child in need' assessment involve?

It is an opportunity to consider all the help that your disabled child needs, the needs of any other children in the family and the help that you may need to care for the disabled child.

The assessment will involve gathering information (which will include an assessor talking with you, your child and other key people in your child's life), reviewing this information and deciding whether any of your child's or family's needs are eligible for support from the local council.

This can be combined with a parent carer's needs assessment, or an assessment of your child's educational needs.

## How do you arrange one?

You can request a 'child in need' assessment by contacting the local council. Explain that your child is disabled and a 'child in need' and that you would like an assessment of the needs of your child and your family to be carried out.

It is useful to note that sending a letter by post or email creates a paper trail that means you can remember dates, times and outcomes of contact further down the line, as needed. You should describe your child's disability, and (if you have one), it might help to provide a copy of any diagnosis they have.

At the end of this guide, you can find an 'assessment tracker' to help you keep on top of contact details and timings.

Describe what difficulties you are having and the type of help you would like. Alternatively, you could ask your GP, health visitor or voluntary organisation to contact them on your behalf. The local council should respond quickly (within one working day), letting you know whether they will carry out the assessment.

## Who would carry this out?

The assessment will normally be carried out by a social worker during a visit to your child's home, but other agencies may also be involved, such as health and education. This assessment can be combined with a parent carer's needs assessment, or an assessment of your child's educational needs.

## How can you prepare for a 'child in need' assessment?

These suggestions may be useful to help you prepare for the assessment:

- **Get together a file with all the relevant information about your child**, such as letters, medical reports, notes, etc, from GPs and professionals involved - evidence can also come from letters / statements from family members, friends, other professionals or anyone who knows your situation.
- **You could arrange for someone to support you at the assessment**, such as an advocate or professional, if you feel it would help.
- **Take time to think about what you want to say**. For example, think about your child's needs, the impact the caring role has on you and your family and the outcome you are hoping for from the assessment.
- **Think about any risks** you, your disabled child and any other family member may experience if support is not provided.
- **Keep a note** of parts of the assessment meeting that you think will be helpful, such as any decisions agreed.
- **We have created a number of resources that may be helpful**, including an 'All about the person you care for' form and a diary to complete that we hope will be helpful for you. See the end of this guide.

Any services to be provided for parent carers of disabled children can be included in a child's Education Health and Care plan, if the child has one. Find out more at: [ipsea.org.uk/faqs/ehc-plan-quick-guide](https://ipsea.org.uk/faqs/ehc-plan-quick-guide).

## What should happen during a 'child in need' assessment?

The assessor should explore these areas during a 'child in need' assessment:

- What are the specific needs of the child?
- Can the child's carers meet those needs?
- What services would help the child and their family?
- The relationships between the family
- What help is already being given by wider family, friends and the community?
- Housing.

For statutory guidance on multi-agency working to help, protect and promote the welfare of children, see [Working together to safeguard children - GOV.UK](#). In essence, this means that other agencies may also complete assessments in a coordinated and planned way at the same time as the 'child in need' assessment. For example, this could be your child's education needs or their mental health through the Child and Adolescent Mental Health Service (CAMHS).

## What support might your child be entitled to?

Local councils have different eligibility criteria for deciding who to provide support to. If your child has been assessed as requiring support, these will be set out in a care plan, which should be reviewed every six months.

Examples of the types of support include:

- practical assistance in and around your home, such as home help, personal care, a sitting service, equipment or adaptations
- services based outside the home, such as an after-school club or holiday play scheme
- travel and other social care assistance to enable your child to take part in recreational activities or education holidays
- temporary short breaks or respite care or the provision of accommodation on a longer-term basis.

The local council can also provide services that can help the family and you as a carer. If your child is not assessed as being a 'child in need', you can ask for an explanation from social services which should be provided in writing within 10 working days. If you wish to challenge a decision that you feel is incorrect, we have guidance on how to go about this on page 40.

### **What if I'm not the parent carer of the child in need?**

A carer of a disabled child (or children) may not necessarily be their parent. Perhaps you are a close relative or extended family member. If you don't have parental responsibility for the child, you wouldn't have the same rights to an assessment as a parent carer.

However, under The Carers (Recognition and Services) Act 1995, you may be able to gain support through a carer's assessment by demonstrating that you are providing, or intend to provide, regular and substantial care.

## **How to get support through a young carer's assessment**

### **Who can request a young carer's assessment?**

If you are under 18 and have caring responsibilities, you would be classed as a child. You would have a right to a young carer's assessment under the Children's Act 1989 and the Children and Families Act 2014. As part of the whole family approach, if there is a disabled adult being cared for, the local council has a duty to consider whether there are any children involved in providing that care, and if so, what the impact is on you.

If you haven't been offered one yet, you can contact the local authority by phone, in writing or online, and ask for a 'young carer's assessment'. It's worth noting that if you decide to request an assessment over the phone, there won't be a paper trail of the request to refer to.

Often people find it helpful to record dates, times and people they've spoken to before, during and after assessments. Our assessment tracker, found at the end of this guide, could be a useful way to record and keep track of these details.

## What's the whole family approach?

When carrying out any assessment, local councils are expected to adopt what is called a whole family approach. This means considering how the needs of the person being assessed affect other family members, or anyone in their support network.

There are few prescriptive rules about the whole family approach, but it should mean that local councils pay more attention to the views of carers, as well as the needs of children or other adults who live with or support the disabled person, but are not immediately considered to be carers. An example might be looking at the effect on a child when their parent is caring for a sibling.

The local council has a duty to assess 'on the appearance of need' (ie without a 'request' having to be made) and the assessment must involve the child with caring responsibilities, their parents and any other person the young carer requests in the assessment process. If the person being looked after lacks capacity to refuse a needs assessment, social services can still carry one out if it is deemed to be in their best interests. For more details, see section 11 of the [Care Act 2014](#).

The assessment should look at:

- Does the young carer wish to continue caring, and is it appropriate for them to continue caring?
- Has a needs assessment been carried out for the person they're caring for?
- how much care is the young carer providing?
- What type of care are they providing?
- What is the impact on their wellbeing?
- Are there any education, training, work or recreational activities the young carer is involved in or wishes to participate in?
- Is any of the care taken on by the young carer excessive?  
Examples of excessive care might be the young carer having poor school attendance or no time for friendships due to their caring responsibilities.
- Is any of the care provided by the young carer inappropriate?  
Examples of this might be managing personal care for an adult,

such as help bathing or having to be in charge of managing the household's money.

- Is the young carer also a 'child in need'? The definition and criteria of a 'child in need' is explained on pages 20-21 of this guide.

Where a young carer's eligible needs are identified as requiring support, local councils will have to:

- provide support directly to the young carer or
- demonstrate that the assessment of the person being cared for has provided adequate care and support to prevent inappropriate care being required from the young carer.

Local councils are also encouraged to consider combining the assessments of people within the same family, for example those of the carer and the person being cared for, so that the assessments are linked and complementary.

Similarly, assessments can sometimes be carried out jointly with another agency, such as the NHS, to ensure that all the professionals involved in a person's care are talking to each other when decisions about care are being made.

## How can I prepare for a young carer's assessment?

When preparing for a young carer's assessment, it's worth taking some time to think about how caring affects you.

Consider what would help make a difference to you as a carer. This will help when you discuss the areas that the local council will need to look at when doing a young carer's assessment.

### Tools to help

To help, we have developed some resources including an 'All about the person you care for' reference sheet, an assessments tracker, and a diary template to help you record what type of caring tasks you're performing and for how long. These can be found towards the end of this guide.

### Friends and family

It might be helpful to talk to friends and family about your role to help you

think about your needs. The assessment is designed to help the local council understand what areas you need support with. You may find it helpful to write some notes for yourself while talking with family or friends.

## Checklist

Here's a checklist of useful information to provide as evidence in the assessment:

- medical diagnosis information about the person you are caring for
- details of medical appointments
- a statement from the person's GP about support the person you care for may need to manage their condition/s and consequences if that support is not available
- a statement from school about the impact of being a young carer on your education – such as attendance, friendships and/or ability to concentrate
- statements from any family and friends who are not involved in the assessment but have relevant information about the needs of the person you are caring for or your needs
- details of any care that you are already giving as a young carer and any additional help family, friends and the community are giving – all needs, whether met or not, must be recorded in the assessment
- real-life examples of the consequences of needs not being met, eg safety issues around needing to provide physical help such as lifting a parent into bed
- details of any training opportunities, education or courses you want to undertake.

## What happens after a young carer's assessment?

Once the assessment is complete, the information gathered during the assessment must be reviewed and the local authority will decide whether you meet the eligibility criteria for support services.

## What kind of support might be provided if you have eligible needs?

If the council decide that you have eligible needs, they will have to:

- provide support directly to you as a young carer or

- demonstrate that the assessment of the person being cared for means that they will have adequate care support provided to prevent the need for additional care support from you.

The support that could be put in place might be:

- information about local support groups for young carers
- care workers providing care so you can have a break
- care workers providing care that would be inappropriate or excessive for you to provide.

### If you don't have eligible needs

If the local council decides that you do not have eligible needs, you must be given a written decision explaining this. You must also be given advice and information about what could be done to prevent or reduce your needs either now or in the future. Examples include details of specialist counselling support in your area, respite support provided by local agencies or local services such as prepared meals brought directly to the home. This advice and information should be based on your specific circumstances.

Please note that you can challenge this decision if you feel it is incorrect; information about this is available on page 40 of this guide.

### Combined assessments

Local councils are also encouraged to consider combining the assessments of people within the same family, for example those of the carer and the person being cared for, so that the assessments are linked and complementary.

Similarly, assessments can sometimes be carried out jointly with another agency, such as the NHS, to ensure that all the professionals involved in a person's care are talking to each other when decisions about care are being made. The Children's Society has a very thorough guide about young carers' assessments which may be helpful if you would like further information: [2022419 Whole-Family-Pathway AW.pdf](#).

Additionally, there's a range of information and resources about support specifically for young carers on the Carers Trust website here: [carers.org/getting-support-if-you-are-a-young-carer-or-young-adult-carer](https://carers.org/getting-support-if-you-are-a-young-carer-or-young-adult-carer).



## What happens when you approach adulthood?

When young carers and disabled children in need are approaching their 18<sup>th</sup> birthday, they can have a transition assessment to establish what support they will need as an adult. This will determine whether you are still eligible for support and what that support will look like.

## Transition assessments for young carers and young people needing care as they approach 18

### Transition assessments

If you're approaching your 18th birthday as a carer, or the person you're caring for is, you can have what's known as a transition assessment. Local councils have to provide support to enable individuals and families to plan ahead so that there are no gaps in services when a person becomes 18.

This helps to identify any services that you might need during the transition to adulthood. The person being assessed (or their carer) will need to meet certain eligibility criteria (as a carer or disabled person) to receive ongoing support after they turn 18.

According to [the Care Act](#), local councils have a duty to provide this support if it is needed. There are different types of assessments used:

- Children receiving care and support who are approaching their 18th birthday can have a Child's Needs Assessment (CNA) 'in transition'.
- Carers of disabled children who are approaching their 18th birthday can have a Child's Carer's Assessment (CCA) 'in transition'.
- Young carers who are approaching their 18th birthday can have a Young Carer's Assessment (YCA) 'in transition'.

An assessment must be carried out by the local council where it considers:

- the young carer, child or carer of a disabled child is likely to have care and support needs after the child becomes 18 and
- there is 'significant benefit' to the young carer, child or adult carer if an assessment is carried out.

Young carers and carers of disabled children are entitled to an assessment even where the person being cared for (child or adult) does not receive care and support services.

## Timing

There is no rule about what age the child needs to be before an assessment can be requested or made. Different organisations suggest different timescales – for example, some say six months before an individual's 18th birthday, while some say that the conversation will begin at year 9 if the child has an Education, Health and Care Plan.

Your local council should be flexible so that every individual's circumstances can be taken into account when deciding if and when an assessment is made.

If the local council decides that the child will have a need for care and support after they turn 18, they should carry out an assessment. This should be carried out before the child becomes 18. However, if it hasn't happened by the time the child reaches 18, any support currently being provided should continue until an assessment has been carried out and a decision has been made.

## Can the council decide not to go ahead?

The local council can decide not to carry out an assessment if it considers that the timing is not of significant benefit to the child's preparation for adulthood. If this happens, they should advise when it is likely to be of most benefit and contact the child or you to arrange the assessment at that time.

They can also decide not to carry out an assessment if they consider there is not likely to be a need for care and support after the child becomes 18. It is unlikely that this would happen, as most people currently continue to require support. However, if this does happen, any support currently being provided for the child would stop when they turn 18.

## What should the transition assessment consider?

Local councils will need to consider:

- the current needs of the person, including the types of adult care and support that might be beneficial before adulthood
- what needs they are likely to have when they turn 18 (or the child they care for turns 18)
- the outcomes, desires and goals they want to achieve in life – this can be related to employment, education, training, independent living, friends, relationships, community participation and activities.

Carers of disabled children and young carers should especially consider whether they are willing to continue caring, both now and when the child turns 18, and whether they want to participate in work, education, training or recreational activities.

The local council has a legal responsibility to cooperate by working with the child, their family and professionals in health, education and social care to make this transition to adult care as smooth as possible.

The Care Act states that the local council can combine any of these 'transition' assessments with any other assessment being carried out (such as education and health), provided all parties agree.

For example, if a hospital is carrying out an assessment at the same time as the local council's assessment, the local council can carry out that assessment jointly with the hospital.

### What happens after the transition assessment has been carried out?

Following the assessment, you should receive:

- advice and information about the sort of support you can expect once the disabled child or you as a young carer turns 18
- guidance on reducing your needs with assistance on how to prevent future needs.

We have an in depth [transition care guide](#) which is available to download from the Carers UK website with more information about what to expect.

## Moving areas

If the person you care for is receiving services from one local council in England (the first council) and then moves to another local council area in England (the second council), there should be no gap in care and support when the move happens. This is part of the Care Act and is known as 'continuity of care': see [Care Act factsheets - GOV.UK](#).

If you are moving to another area outside of England, you should seek advice. You can reach the Carers UK Helpline using the email address [advice@carersuk.org](mailto:advice@carersuk.org).

The person you care for (or you on their behalf) should tell the first council and the second council of their intention to move and of their wish to be assessed. The second council then has to:

- provide the person and their carer with information they may need
- request any information they need from the first council
- carry out an assessment of their needs.

The table on the following page summarises the responsibilities of the first council (first local authority) and those of the second council (second local authority), where the person requiring care support is moving to.

| First council  | Second council  |
|--|---|
| <ul style="list-style-type: none"> <li>- Provides the second council with the agreed Care and Support Plan</li> </ul>        | <ul style="list-style-type: none"> <li>- Is made aware of the person's needs and background and any other relevant details</li> </ul>   |
| <ul style="list-style-type: none"> <li>- Is responsible for making any arrangements needed on the day of the move</li> </ul> | <ul style="list-style-type: none"> <li>- <b>If they haven't made a decision about the person's support needs before the move,</b> they must continue to meet the needs already identified by the first council.</li> <li>- <b>If they then make a different decision,</b> they must explain why.</li> </ul> |
| <ul style="list-style-type: none"> <li>- Provides the second council with any other relevant information</li> </ul>          | <ul style="list-style-type: none"> <li>- Provides person/ carer with any information they require, and requests any further information needed from the first council before carrying out an assessment</li> </ul>  |

## Charging

Once the local council has completed its assessment, and it has been agreed what support will be provided, a financial assessment may be carried out. In some cases, the local council may decide that you can pay for your own care support if they feel you are in a position to, following your financial assessment. They should, however, be clear about your options. Some services are not means-tested and are therefore free for all.

The financial assessment would look at the income and capital of the person who the support is for (or their parents' if the support is for a child

aged under 16), including any share of joint income or capital. Different outcomes could be:

- You/they are entitled to receive the support free of charge.
- You/they have to pay something towards the cost of the support.
- Your/their income or capital is above the threshold and so the local council does not have to provide any support – in this situation the local council can still be asked to provide the support (unless it is residential care). However, the local council can also charge for the cost of arranging and managing the support as well as the support they provide.

Some examples of types of support that you wouldn't be charged for:

- equipment, aids and adaptations in the home up to the value of £1,000 – see examples [here](#)
- [short-term care](#) (up to 6 weeks) after leaving hospital (sometimes called reablement or intermediate care)
- aftercare support to help someone after leaving hospital if they have been kept in hospital under the Mental Health Act ([useful information on Mind's website](#)).

### **If you are an adult carer looking after an adult, or an adult who requires care and support**

If you are an **adult carer looking after an adult**, the local council may carry out a financial assessment. However, not all local councils charge for support provided to carers.

If you are an **adult who requires care and support**, the local council will carry out a financial assessment, unless the support is of a type that is free of charge, such as minor aids and adaptations.

## What steps does a local council take to carry out a financial assessment?

**Step 1:** A financial assessment officer will be in touch to review how much money you can contribute to your care needs (if at all). This would happen after a carer's assessment or needs assessment.

**Step 2:** If you have savings (capital) over **£23,500** – for 2025/26, you will usually have to pay the full cost towards your care. This amount is known as the **upper capital limit**. There is also a **lower capital limit** that's taken into account, which is **£14,250** – for 2025/26. If you have any savings below this amount, they should be ignored.

**The value of the home you live in should not be taken into account as capital** – unless you move into residential care in which case the value of the home you used to live in can sometimes be taken into account as capital. There are certain exceptions so do seek further advice.

**When deciding how much income you have, only some income is taken into account.** Certain types of income are always ignored including: earnings; the mobility component of Disability Living Allowance (DLA) and the mobility component of Personal Independence Payment (PIP).

- They can treat disability-related benefits, such as the care component of DLA, the daily living component of PIP or Attendance Allowance as income. However, if they do, they should deduct any 'disability-related expenditure.'

**Step 3: To ensure that you have enough money to live on, the local council has to leave you with a protected amount:**

- For carers and for non-residential support for the person you care for, this amount is called the **Minimum Income Guarantee (MIG)**. This is a weekly amount – see this page for the [rates for 2025-26](#).
- For residential care for the person you care for, this amount is called the **Personal Expenses Allowance (PEA)**. PEA is normally a set amount, but it can be increased in certain circumstances – for 2025/26, the PEA is £30.65 a week.

**Step 4:** If you have income (including income from capital) above your protected amount, this is the amount you would need to pay towards the cost of the support. You can read more about this on the [NHS website](#).

►► **Note: Only the person receiving the support can be charged.**

As a carer, you cannot be charged for support provided to the person you care for (replacement care for example), and the person you care for cannot be charged for support provided to you as a carer.

**If you are a carer for a child under 18 or if you are a young carer**

Local councils can charge for services provided to disabled children, parent carers of disabled children and young carers. The local council should have its own charging policy and this should explain how they carry out their financial assessment.

If the service is for a disabled child or a young carer who is aged under 16, the local council would look at the income and capital of their parents. If the service is for a disabled child or young carer who is over 16, the local council would look at their income and capital. If the service is for a parent carer, the local council would look at the income and capital of that parent.

It's important to note that local councils cannot charge for services if the person whose income/capital is being looked at gets any of these benefits:

- Income Support
- Income-related Employment and Support Allowance
- Income-based Jobseeker's Allowance
- Working Tax Credit
- Child Tax Credit (other than the family element)
- Universal Credit (except in certain circumstances).

If you need some help to understand what would happen in relation to your own situation, you can get in touch with one of our Carers UK advisers by emailing: [advice@carersuk.org](mailto:advice@carersuk.org).



## Complaints

### Assessments

If you are not happy with the way you have been treated, or with the outcome of any of the assessments, you can raise this first of all with the local council. All local councils should have a complaints procedure that you can follow; you can ask them for a copy.

If you are not happy with the outcome of your complaint, you may be able to take it to the Local Government and Social Care Ombudsman:

[lgo.org.uk](http://lgo.org.uk). They have a useful guide about how the complaints process works here: <https://www.lgo.org.uk/how-to-complain>.

If the local council has acted unlawfully (eg they have refused to carry out an assessment without good reason), you may be able to take them to court. This is called a judicial review. You will need to seek legal advice if you are thinking about taking the local council to court.

An application for judicial review must be made without delay and within a maximum period of three months, so it is important to gain legal advice as quickly as possible. Contact the Disability Law Service for guidance:

[dls.org.uk](http://dls.org.uk).

### Support following an assessment

Following an assessment, if you are dissatisfied with the support you receive, you can complain to the local council using their complaints procedure.

If the support has been provided by an agency or care home, you may also be able to complain directly to them through their own complaints process. You can also contact the Care Quality Commission if you are concerned about the quality of the service: [cqc.org.uk](http://cqc.org.uk). For more information about making a complaint, visit [carersuk.org/making-complaints](http://carersuk.org/making-complaints).

## Some helpful aids and tools to help with assessments

### 1) Signposting you to support

Our '[While you are waiting](#)' factsheet helps you find direct support and advice when waiting for an assessment.

### 2) Template letters to request assessments and challenge decisions:

[www.accesscharity.org.uk/member-resources/thyehk](http://www.accesscharity.org.uk/member-resources/thyehk)

There are also easy-read materials at the end of this page.

### 3) What have I applied for? tracker

This tracker helps to keep a log of what you have applied for and when – helping you to chase up professionals and keep abreast of timings.

Download your version at [Practical support | Carers UK](#) under 'Planning'.

### 4) Preparing for assessments

- All about the person I'm caring for reference sheet – find under 'Planning' at: [Practical support | Carers UK](#). See page 43 for a visual example.
- Diary: Find under 'Planning' at [Practical support | Carers UK](#). See page 44 for a visual example.
- Questions to help you prepare for your carer's assessment if you're caring for an adult – see page 45.

## All about the person I'm caring for

### About the person I care for

#### Personal details

|                                       |  |               |  |
|---------------------------------------|--|---------------|--|
| Name                                  |  |               |  |
| Age                                   |  | Date of birth |  |
| Diagnosis (list all if more than one) |  |               |  |
|                                       |  |               |  |
|                                       |  |               |  |
| Other important details               |  |               |  |
|                                       |  |               |  |

#### Medications

| Name | Dosage | Frequency | Storage | Pharmacy | Other details |
|------|--------|-----------|---------|----------|---------------|
|      |        |           |         |          |               |
|      |        |           |         |          |               |
|      |        |           |         |          |               |
|      |        |           |         |          |               |

#### Medical appointments

| Type | Frequency | Location | With who | Duration |
|------|-----------|----------|----------|----------|
|      |           |          |          |          |
|      |           |          |          |          |
|      |           |          |          |          |

#### GP details

|              |  |         |  |
|--------------|--|---------|--|
| Name         |  |         |  |
| GP Address   |  |         |  |
| Telephone no |  | Website |  |

#### Equipment required (eg wheelchair, hoist, sensory aids etc.)

| Equipment | Reason | Location |
|-----------|--------|----------|
|           |        |          |
|           |        |          |
|           |        |          |

#### Emergency contacts

| Name | Phone number | Relationship | Availability |
|------|--------------|--------------|--------------|
|      |              |              |              |
|      |              |              |              |

Diary

My caring diary

Use this table to help document the time you spend caring each day which may be helpful during your assessment.

| Activity                        | 6am–9am | 9am–12pm | 12pm–3pm | 3pm–6pm | 6pm–9pm | 9pm–12am | 12am–3am | 3am–6am | TOTAL TIME |
|---------------------------------|---------|----------|----------|---------|---------|----------|----------|---------|------------|
| Waking up / going to sleep      |         |          |          |         |         |          |          |         |            |
| Getting in/out of bed           |         |          |          |         |         |          |          |         |            |
| Cooking                         |         |          |          |         |         |          |          |         |            |
| Eating                          |         |          |          |         |         |          |          |         |            |
| Washing                         |         |          |          |         |         |          |          |         |            |
| Toileting                       |         |          |          |         |         |          |          |         |            |
| Medication                      |         |          |          |         |         |          |          |         |            |
| Dressing/undressing             |         |          |          |         |         |          |          |         |            |
| Activities (playing, leisure)   |         |          |          |         |         |          |          |         |            |
| To and from appointments/school |         |          |          |         |         |          |          |         |            |
| Communicating with others       |         |          |          |         |         |          |          |         |            |
| Other                           |         |          |          |         |         |          |          |         |            |

Tracker of what I’ve applied for

What have I applied for?

Use this table to help you keep track of what sources of support and assessments you have applied for.

This can be particularly useful to refer back to if you need to get back in touch with professionals – you’ll have all the details of applications to hand as evidence. **An example is shown to help you get started.**

| Date applied          | Type of support applied for | How? (e.g phone/ letter/email) | Contact details used        | Response received and date   | Assessment date | Assessment outcome given on | Care plan/ benefit begins on | Review due by |
|-----------------------|-----------------------------|--------------------------------|-----------------------------|--|-----------------|-----------------------------|------------------------------|---------------|
| (Example)<br>20/09/24 | Child in Need Assessment    | Used template letter by email  | social.services@kent.gov.uk | Social worker (name) contacted by (email) on (date) to arrange Child in Need Assessment for (date) | 20/10/24        | 25/10/24                    | 1/12/2024                    | 1/4/2026      |
|                       |                             |                                |                             |  |                 |                             |                              |               |
|                       |                             |                                |                             |  |                 |                             |                              |               |
|                       |                             |                                |                             |  |                 |                             |                              |               |

## Questions to help you prepare for your carer's assessment if you're caring for an adult

By answering the following questions, you should get a much clearer idea of your needs. You can then discuss with the local council professional what support might be most helpful to you to meet these needs.

### Help and time

- Do you help the person you care for with:
  - housework?
  - cooking?
  - shopping?
  - laundry?
  - bathing?
  - going to the toilet?
  - other personal care?
  - keeping an eye on them?
  - dealing with money?
- How many hours a week do you provide care? (Include all the time you spend with the person you care for, the things you do for them, and how long it takes.)
- Do you have to help during the day or night, or both?
- Does anyone else help? If so, for how long?
- Would you like some help (or extra help) with these jobs? List the tasks you would like help with (putting the most important first).
- Are you able to spend enough time on other family responsibilities, eg being with your children, your partner, parents or siblings?

### Health

- Does the person you care for have any health problems you find hard to deal with? Describe them as fully as you can.
- Do you have the information you need about the condition of the person you care for to enable you to care for them fully?

- Do you have any health problems? If so, are they made worse by your caring role? Describe them as fully as you can.
- Do any health problems you may have make it harder for you to care?
- Are you getting enough sleep?
- Do you feel you are suffering from stress or depression?
- Is caring having a negative impact on your health?
- Is caring preventing you from looking after your own health, ie your diet, nutrition, getting exercise, etc?

### **Feelings and choices about your caring role**

- Do you feel that you do not have a choice about providing care?
- If you feel that you cannot carry on at all, or can only carry on if you reduce the amount of caring you do, tell the local council. It is not unusual to feel this way and it is important they know how you really feel.
- What would you most like to change about your situation?
- Is there a plan in place to look after the person you care for if you were suddenly unable to care for any reason?

### **Work/study/leisure**

- Do you work? If so, for how many hours a week?
- Does your employer know that you are a carer – do they know about your rights, eg to time off in an emergency?
- Do you feel you can manage to work and provide care? If you cannot manage or are at risk of not managing, do explain this.
- What would make working/caring easier for you?
- Would you like to start or return to work/study?

- Do you have the skills you would need to return to work or education were your caring role to end?
- Are there things that you find enjoyable and relaxing that you cannot do anymore because of your caring responsibilities, such as a hobby, visiting friends or going to the cinema?
- When was the last time you had a whole day to yourself to do as you pleased?
- Are you able to keep in contact with friends and family?

## Housing

- Do you live with the person you care for? Is the arrangement satisfactory? If not, why not?
- Does the person you care for have any difficulties moving around their home? Can they climb the stairs or have a bath/shower on their own?
- Do you have to help them? If so, are you able to do this safely and without causing yourself any pain or injury? Special equipment could make life easier for the person you care for and caring easier for you.
- Are you able to look after your own home? Do you have enough time to attend to housework and keep your house as you would like it?

This factsheet is designed to provide helpful information and advice. It is not an authoritative statement of the law. We work to ensure that our factsheets are accurate and up to date, but information about benefits and community care is subject to change over time. We would recommend contacting the Carers UK Helpline or visiting our website for the latest information.

Please email us your feedback on this factsheet by sending your comments to [info@carersuk.org](mailto:info@carersuk.org)  
This factsheet was updated in April 2025. Next review due April 2026.

### **Carers UK Helpline**

For expert information and advice about caring.



**0808 808 7777**

(Monday to Friday 9am-6pm)



**@ advice@carersuk.org**

### **Carers UK**

20 Great Dover Street  
London SE1 4LX  
[info@carersuk.org](mailto:info@carersuk.org)

### **Carers Wales**

029 2081 1370  
[info@carerswales.org](mailto:info@carerswales.org)

### **Carers Scotland**

[info@carerscotland.org](mailto:info@carerscotland.org)

### **Carers Northern Ireland**

[advice@carersuk.org](mailto:advice@carersuk.org)

**However caring affects you,  
we're here.**

Caring will affect us all at some point in our lives.

With your help, we can be there for the 6,000 people who start looking after someone each day.

We're the UK's only national membership charity for carers: join us for free at [carersuk.org/join](https://carersuk.org/join)

We're both a support network and a movement for change.

Visit us at our website to join us, help us or access more sources: [carersuk.org](https://carersuk.org)

**This information can be requested  
in large print or as a text file.**