Preparing for a Home Care Assessment

Use this before an agency, care manager or program comes to assess what help your parent needs at home, so the plan they write matches real life.

Most home care agencies visit before care starts to see the home and talk about what help is needed; many don't charge for it. Medicaid programs, long-term care insurance and some veterans' programs do their own assessments, which can decide how many hours they will pay for. Ask who is coming, how long it takes, and what it decides.

Who is coming: _____ **Date and time:** _____

From (agency or program): _____ **Phone:** _____

Before the visit

- ☐ Tell your parent who is coming and why. Ask what they want the person to know.
- ☐ Plan for the family member who knows the daily routine best to be there.
- ☐ Keep a few days of notes on a typical day: when they get up, eat, bathe, take medicines, and go to bed (use the table below).
- ☐ Gather: insurance cards, the medicine list or bottles, the list of doctors, and any power of attorney or health care proxy papers.
- ☐ If long-term care insurance or Medicaid is involved, have the policy or case number ready.

© 2026 Mark Duda. Print and copy for your own family's use. Not medical advice.

A typical day, honestly

Parents often say "I manage fine" to a stranger. Write down what really happens, kindly and specifically.

Activity	Does it alone	Needs some help	Needs a lot of help	Notes
Bathing or showering				
Dressing				
Using the toilet				
Getting in and out of bed or a chair				
Walking around the house				
Eating				
Taking medicines				
Cooking and meals				
Housekeeping and laundry				
Shopping and errands				
Managing money and bills				
Getting to appointments				

During the visit

- ☐ Let your parent speak first. Then add what you've seen, gently, with examples.
- ☐ Mention the bad days and the nights, not just today.
- ☐ Point out safety worries: falls, the stove, wandering, missed medicines.
- ☐ Ask what the plan will include, how many hours, and when it will be reviewed.

Questions to ask

- ☐ What did you find, and what do you recommend?
- ☐ How many hours a week, and what will the aide do in each visit?
- ☐ When will we see the written care plan?
- ☐ How do we change the plan if needs change?
- ☐ For insurance or Medicaid: how many hours are approved, and how do we appeal?

© 2026 Mark Duda. Print and copy for your own family's use. Not medical advice.

Your parent leads, when they can. Most decisions are theirs to make, and health questions belong with their doctor. This checklist helps your family organize and take the next step together.

The Family Caregiver Quick-Start: 1. Can No Longer Live Alone: What to Do First · 2. Signs a Parent Needs More Help · 3. Preparing for a Family Care Meeting · 4. Choosing a Home Care Agency · 5. Preparing for a Home Care Assessment · 6. What to Bring to a Medical Appointment · 7. Organizing a Parent's Important Information. All at AgingAtHomeSupport.com/caregiver-quick-start/

To write your own care plan before or after the assessment, see The Family Care Plan workbook at AgingAtHomeSupport.com/family-care-plan/

© 2026 Mark Duda. Print and copy for your own family's use. Not medical advice.