

Senior Home Needs Assessment Worksheet

Instructions:

For each category, check [Yes] if the need is met, [No] if improvements are needed, or [Maybe] if unsure. Use the Notes section to detail concerns or solutions.

1. Home Safety & Accessibility

- ☐ Is the main entrance step-free or have a ramp?
- ☐ Are doorways at least 36 inches wide for accessibility?
- ☐ Are there sturdy handrails on all staircases?
- ☐ Is the bathroom equipped with grab bars and non-slip mats?
- ☐ Is there adequate lighting in hallways, stairs, and main living areas?
- ☐ Are frequently used items stored at an easy-to-reach height?
- ☐ Is there a medical alert system or easy access to a phone in case of emergency?

2. Health & Wellness

- ☐ Are medications taken as prescribed and organized properly?
- ☐ Is there a plan for emergency medical situations?
- ☐ Are there regular check-ups with healthcare providers?
- ☐ Is there access to healthy, nutritious meals daily?
- ☐ Is exercise or physical activity part of the routine?
- ☐ Are there any chronic health conditions that need better management?

3. Daily Living & Independence

- ☐ Can daily tasks (cooking, cleaning, bathing, dressing) be done independently?

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- ☐ Are there transportation options for errands and appointments?
- ☐ Are there difficulties with vision, hearing, or mobility that need addressing?
- ☐ Is personal hygiene maintained without difficulty?
- ☐ Is there a plan for home maintenance (lawn care, repairs, housekeeping)?

4. Social Connection & Engagement

- ☐ Are there regular social interactions with family and friends?
- ☐ Are there hobbies or activities that bring enjoyment?
- ☐ Is there involvement in clubs, groups, or community events?
- ☐ Are there feelings of loneliness or isolation?
- ☐ Is there access to technology (phone, email, social media) for staying in touch?

5. Financial & Legal Planning

- ☐ Is there a budget in place to manage retirement income and expenses?
- ☐ Are all important documents (will, power of attorney, healthcare directives) up to date?
- ☐ Is there a plan for long-term care if needed?
- ☐ Are housing costs manageable (mortgage, rent, utilities, property taxes)?
- ☐ Is there an emergency fund for unexpected expenses?

Overall Assessment

Based on the responses, what are the priority areas that need attention?

- ☐ Home Safety & Accessibility
- ☐ Health & Wellness
- ☐ Daily Living & Independence

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[] Social Connection & Engagement

[] Financial & Legal Planning

Final Thoughts

This assessment is a starting point for making informed decisions to improve quality of life while aging at home. Addressing these needs early can enhance safety, independence, and overall well-being.

Next Steps:

- Discuss results with family, caregivers, or professionals.
- Research available community resources.
- Implement necessary home modifications or lifestyle changes.