Handout 6 – Guidelines for Conducting an Assessment

A comprehensive assessment involves finding out about the person with disabilities.

This includes:
• Establishing a rapport and a level of trust in your relationship with the person
• Explaining to the person who you are, the service that you are able to offer
• Explanation of the assessment process including the type of information that will be needed, how it will be collected and stored and who will have access to it, the persons rights and responsibilities and the process for managing complaints
• Listening to the person’s story and respecting their viewpoint and providing advocacy to support their choices.
• Using a problem solving approach to identify the person’s needs, goals and resources, interests and abilities
• Mapping the networks and identifying their informal and formal support as well as their internal and external resources
• Obtaining the permission to seek information from other people including significant others such as family and friends and other services providing assistance to the person
• Ensuring that the process is sensitive to the cultural needs and perspective. This may mean that an interpreter, or signer or other specialist worker is needed to assist with the assessment
• Using previous assessments
• Making using of the agencies assessment checklist. This checklist can also be used as a prompt for areas to be discussed with the person and others involved in the assessment process
• Ensuring the person has access to the information
• Identifying the lead agency and the case manager when a number of different agencies are involved and the case management model is being applied.

Beware

• Of excessive questioning. It is not an interrogation
• Don’t get bogged down. The person is the main concern, not the paperwork
• It is not a therapy session
• Do not overlook possible resources like family and friends.

Don’t underestimate the person’s existing abilities, talents and personal resources.