Care Coordination: Comprehensive Patient Assessment

The following is a checklist of elements that could be included when conducting an assessment of a person with complex medical, functional, behavioral, or cognitive needs. This list is not meant to be all-inclusive, but rather a guideline of different information that would be helpful to collect when assessing individuals. Collaborate with primary care and other care coordinators to develop an integrated patient centered care plan.

General Information

☐ Identify any language or cultural barriers
☐ Include family decision maker and emergency contact noting they may be different persons
☐ Identify a “Care Partner” (might accompany the patient to primary care visits, provide medication set up, etc.)
☐ Identify caregiver supports (If a caregiver is involved conduct the Caregiver Assessment found on page 7 of the Toolkit.)
☐ Identify other care coordinators involved in patient’s life/care (See page 10 for definitions/descriptions and other care coordination and transition models)
☐ List other agencies providing service/involved in the care of the patient

Health Assessment

☐ Identify other physicians involved in care
☐ List conditions/diagnoses
☐ List medications, including: OTC drugs, herbal remedies and supplements; and assess interactions (See page 20 for links and tools)
☐ Assess cognition (For all patients over 65 perform a Mini-Cog.) (See link on page 24 for provider best practices)
☐ Assess home/living environment (See page 29 for links to helpful tools)
☐ Assess ability to perform Activities of Daily Living (ADLs) and Instrumental ADLs in patient’s home environment
☐ Identify need for special equipment/assistive devices
☐ Identify medical treatments/therapies being utilized
☐ Assess behavioral health, including emotional health, mental health, and substance use/misuse (See page 27 for tools and links)
☐ Assess nutritional needs
☐ Identify utilization of other medical resources (frequency of hospitalizations, emergency room visits, nursing facility care)
☐ Assess self-Preservation and safety
☐ Assess risk for abuse/neglect
☐ Assess exercise routine
☐ Identify hobbies and interests
☐ Identify any Advanced Directives in place (See page 29 for links to optional documents)