

## 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](#))