



# IN HOME CARE PROVIDERS LLC

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## New Client Caregiver Plan & Needs Assessment Application

### SECTION 1: CLIENT INFORMATION

- Client Full Name: \_\_\_\_\_
- Date of Birth: \_\_\_\_\_
- SSN (last 4 digits): \_\_\_\_\_
- Address: \_\_\_\_\_
- Phone Number: \_\_\_\_\_
- Emergency Contact Name & Phone:
  - 1) \_\_\_\_\_
  - 2) \_\_\_\_\_
  - 3) \_\_\_\_\_

Primary Physician Name & Phone:

\_\_\_\_\_

### SECTION 2: INSURANCE & FUNDING

#### -Private Insurance

Name & Member ID# (if any): \_\_\_\_\_

- Medicaid ID #: \_\_\_\_\_
- Medicare ID #: \_\_\_\_\_
- Payer Source: ☐ Medicaid Waiver ☐ Private Pay ☐ Veterans Services ☐
- Other: \_\_\_\_\_

**SECTION 3: LIVING SITUATION & ENVIRONMENT**

- Client lives: ☐ Alone ☐ With family ☐ With caregiver ☐ Assisted living -

Type of residence: ☐ House ☐ Apartment ☐ Mobile Home ☐ Other: -

Any safety hazards

noted: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**SECTION 4: CLIENT NEEDS ASSESSMENT**

- ☐ Bathing Assistance
- ☐ Dressing
- ☐ Grooming
- ☐ Oral Hygiene
- ☐ Toileting
- ☐ Ambulation
- ☐ Medication Reminders
- ☐ Feeding
- ☐ Vital Signs Monitoring
- ☐ Light Housekeeping
- ☐ Laundry
- ☐ Meal Preparation
- ☐ Grocery Shopping
- ☐ Transportation
- Additional Notes: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

**SECTION 5: COGNITIVE / MENTAL STATUS**

- ☐ Oriented
- ☐ Memory Impairment
- ☐ Supervision Required
- ☐ Dementia
- ☐ Depression/Anxiety
- Behavioral Concerns: \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**SECTION 6: MEDICAL INFORMATION**

- Diagnoses:
- Allergies:
- Assistive Devices: ☐ Walker ☐ Cane ☐ Wheelchair ☐ Oxygen ☐ Hearing Aid ☐ Glasses ☐
- Other: \_\_\_\_\_
- Medications: \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**SECTION 7: CLIENT PREFERENCES**

- Preferred Schedule: ☐ Morning ☐ Afternoon ☐ Evening ☐ Overnight
- Days: ☐ M ☐ T ☐ W ☐ Th ☐ F ☐ Sat ☐ Sun
- Preferred Language:
- Cultural or Religious Considerations: \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**SECTION 8: SERVICE PLAN GOALS**

Please describe the primary goals for care: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**SECTION 9: AUTHORIZATIONS & SIGNATURES**

I certify the above information is accurate to the best of my knowledge... Client

/ Authorized Rep Signature: \_\_\_\_\_ Date: \_\_\_\_\_

In Home Care Providers LLC Rep Name/Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_