Basic Assessment Form

Welcome! Please tell us a bit about yourself so we can offer services that best meet your needs. All your personal information is confidential. Please see the attached FAQs for more information.

# Registration and Eligibility Section – Must Be Completed Prior to Service

First Name: Click or tap here to enter text.

Middle Name (if applicable): Click or tap here to enter text.

Last Name: Click or tap here to enter text.

Nickname (if applicable): Click or tap here to enter text.

Date of Birth: Click or tap here to enter text.

Age: Click or tap here to enter text.

Only individuals aged 60 and older are eligible.

# Contact Information Section

Home Phone: Click or tap here to enter text.

Cell Phone: Click or tap here to enter text.

Email: Click or tap here to enter text.

Home Address Line 1: Click or tap here to enter text.

Home Address Line 2 (Apt/Unit/Floor): Click or tap here to enter text.

County: Click or tap here to enter text.

City: Click or tap here to enter text.

State: Click or tap here to enter text.

Zip: Click or tap here to enter text.

Mailing address is the same as home address

Mailing Address Line 1: Click or tap here to enter text.

Mailing Address Line 2 (Apt/Unit/Floor): Click or tap here to enter text.

City: Click or tap here to enter text.

State: Click or tap here to enter text.

Zip: Click or tap here to enter text.

# Demographics Section – Used for Anonymous Reporting to Our Funders

* Gender (select all that apply):

Male

Female

Non-binary/Third gender

Transgender

Another gender not listed: Click or tap here to enter text.

Refuse to answer question

* Ethnicity:

Hispanic or Latino/a/e

Not Hispanic or Latino/a/e

Refuse to answer question

* Racial Identity (select all that apply):

American Indian or Alaska Native

Asian or Asian American

Black or African American

Middle Eastern or North African

Native Hawaiian or Pacific Islander

White

Another identity not listed: Click or tap here to enter text.

Refuse to answer question

* Do you live alone or with others?

Alone

With others

Refuse to answer question

* Is your income above or at/below the amount listed for your household size in the table:

Above

At/below

Refuse to answer question

## Income Levels Table

|  |  |  |
| --- | --- | --- |
| Household Size | Monthly Income | Annual Income |
| 1 | $1,304 | $15,650 |
| 2 | $1,763 | $21,150 |

Use the table to determine if your income is above or at/below the monthly or annual income listed for your household size. For each additional person, add $5,500 to annual income.

# Communication Section

What is your primary language? Click or tap here to enter text.

# Service Access and Support Section

* Health Insurance (select all that apply):

Medicare

Medicare Advantage

Medicaid

Medicaid Waiver(s)

VA

Private

None   
Other insurance: Click or tap here to enter text.

Refuse to answer question

* Can you access this service through another benefit or program? For example, through Medicaid or Medicare benefits?

Yes

No

Refuse to answer question

I don’t know

* Do you have reliable outside support from family, friends, or a caregiver?

Yes

No

Refuse to answer question

* Are you homebound? Select “Yes” if any of the following statements are true for you:
  + You need the help of another person to leave your home, or
  + You have a health condition or disability that makes it difficult to leave your home on a regular basis, or
  + You are only able to leave your home infrequently and for short periods of time

Yes

No

Refuse to answer question

* Are you isolated from community resources? Examples of community resources include stores, banks, health services, and senior center activities. Select “Yes” if any of the following statements are true for you:
  + You live in a remote area, or
  + You have a health condition or disability that makes it difficult for you to access community resources, or
  + You have financial or technology challenges that make it difficult for you to access community resources, or
  + You cannot drive or use public transportation, or
  + You do not feel welcome in your community due to cultural or language barriers

Yes

No

Refuse to answer question

# Emergency Contact Section

Name: Click or tap here to enter text.

Phone: Click or tap here to enter text.

Relationship: Click or tap here to enter text.

Refuse to provide contact

# Disclosures and Waivers

I have been informed of the policies regarding voluntary contributions, complaint procedures and appeal rights. I am aware that in order to receive requested services, it may be necessary to share information with other departments or service providers and I give my consent to do so.

Signature: Click or tap here to enter text.

Date: Click or tap here to enter text.

If filled out by someone other than the client (for example a caregiver or assessor, please check here  and sign below)