

Social and living skills checklist: to assess the adequacy of the care plan in chronic, severe illness

This checklist is simply a list of areas that need to be considered in the care of someone with a long-term, severe illness. It is in addition to more medical assessments such as the individual's mental state, severity of symptoms and medication side-effects. It is likely that this checklist will be used by the individual's key worker in the Community Mental Health Team. From time to time, it could be used in primary care as a check on the adequacy of the care plan and services or to facilitate discussion about shared care.

Basic living skills

Please circle

1. Is basic self-care adequate?

a. Personal hygiene and appearance

Yes No

b. Clothing

Yes No

c. Preparation of meals

Yes No

d. Diet

Yes No

e. Housework (eg washing dishes, laundry, household hygiene, etc.)

Yes No

f. Survival skills in community (eg shopping, transport, crossing roads, etc.)

Yes No

Physical health and medication/treatment

1. Has individual recently had a medical check-up? (Eg general health, optometry, dentistry, podiatry, etc.)

Yes No

2. Are medication and health problems managed appropriately? (Eg non-adherence, side-effects, etc.)

Yes No

3. Is current medication (type and dose) satisfactory for:

a. The individual?

Yes No

b. The case manager?

Yes No

c. The doctor?

Yes No

Housing

1. Is the housing situation adequate? (eg electricity/gas, clean water, rent, heating, phone, furniture, appliances, disputes with landlord/housemates, etc.)

Yes No

2. Is supervision adequate for this individual?

Yes No

3a. Is individual happy with his or her current housing situation?

Yes No

b. Is the case manager happy?

Yes No

c. Are the carers happy?

Yes No

4. If not happy with housing, what kind of housing is preferred?

.....

Finances

1. Is individual receiving all benefits to which he or she is entitled?

Yes No

2. Is the individual's income adequate?

Yes No

3. Can the individual budget and handle money effectively?

Yes No

4. Can the individual handle financial commitments without assistance?

Yes No

Family and social supports

1. Are the individual's family and social supports adequate?

Yes No

2. Do the individual and his or her family have:

a. Clear ideas about roles and responsibilities? (Who does what?)

Yes No

b. Adequate decision-making skills? (Who decides and how?)

Yes No

c. Skills for managing difficult behaviour?

Yes No

d. Satisfactory communication of feelings? (Content and expression)

Yes No

e. Realistic expectations of one another?

Yes No

f. Receptive attitudes to outside assistance? (Accepting help)

Yes No

3. Do the individual and his or her family have adequate:

a. Communication skills?

Yes No

b. Problem-solving skills?

Yes No

Employment

1. If employed, is the work situation satisfactory? (Eg punctuality, attendance, performance, social interactions, etc.)

Yes No

2. If unemployed, is individual suitable for employment?

Yes No

3. If unemployed, can the individual find work without assistance?

Yes No

Legal

1. If subject to the Mental Health Act or legal proceedings, is the matter being handled appropriately?

Yes No

Leisure and social activities

1. Is individual happy with the way spare time is spent?

Yes No

2. Is the case manager happy?

Yes No

3. Is individual happy with present friendships? (Quantity and quality)

Yes No

4. Is individual happy with present leisure activities? (Quantity and quality)

Yes No

Education

1. If the individual is currently undertaking a course of study, is he or she coping with the demands of this study?

Yes No

2. If a current course of study has been interrupted, has the university (or other) been notified and supplied with supportive the documentation for deferral of the course, etc.?

Yes No

3. Is the individual satisfied with his or her current educational status or situation? (Eg further education may be desired).

Yes No

Mental-health services

1. Is the individual happy with the services?

Yes No

2. Is the individual happy with:

a. The case manager?

Yes No

b. The psychiatrist?

Yes No

c. Other mental health workers?

Yes No

d. Choice of treatment?

Yes No

3. Is the individual aware of his or her options re treatment and services?

Yes No

Negative responses on this checklist indicate that intervention of some kind will be necessary.

From Andrews G, Jenkins R, eds. *Management of Mental Disorders (UK Edition)*. Sydney: World Health Organization Collaborating Centre for Mental Health and Substance Abuse, 1999. Distributed for the publishers in the UK by IN 2 Mail Ltd, Fax: (0)1252 322315; PO Box 55, Aldershot, Hampshire GU12 4FP.