

FAMILY GUIDE

Care Needs Worksheet

A simple worksheet to help families capture daily routines, preferences, and current support needs before a care assessment.

Resident overview

Full name

Preferred name

Date of birth

Primary language

Cultural / faith
preferences

Primary contact

Case manager (if
any)

Activities of daily living

For each item, note current independence level (independent / some help / full assistance) and any specific preferences.

Bathing

Dressing

Grooming &
hygiene

Toileting &
continence

Transfers &
mobility

Eating

Sleeping pattern

Health & medications

Diagnoses

Allergies

Current
medications

Recent
hospitalizations

Vision / hearing
aids

Mobility devices

Cognition & memory

Memory concerns

Helpful routines or
cues

Triggers or
stressors

What brings
comfort

Daily life & preferences

Typical morning
routine

Favorite foods /
dietary needs

Hobbies &
interests

Music, TV, or
reading
preferences

Faith or spiritual
practice

Important
relationships &
visitors

Goals for this next chapter

In a few sentences, what would a great day at Serenity Oaks look like for your loved one?

