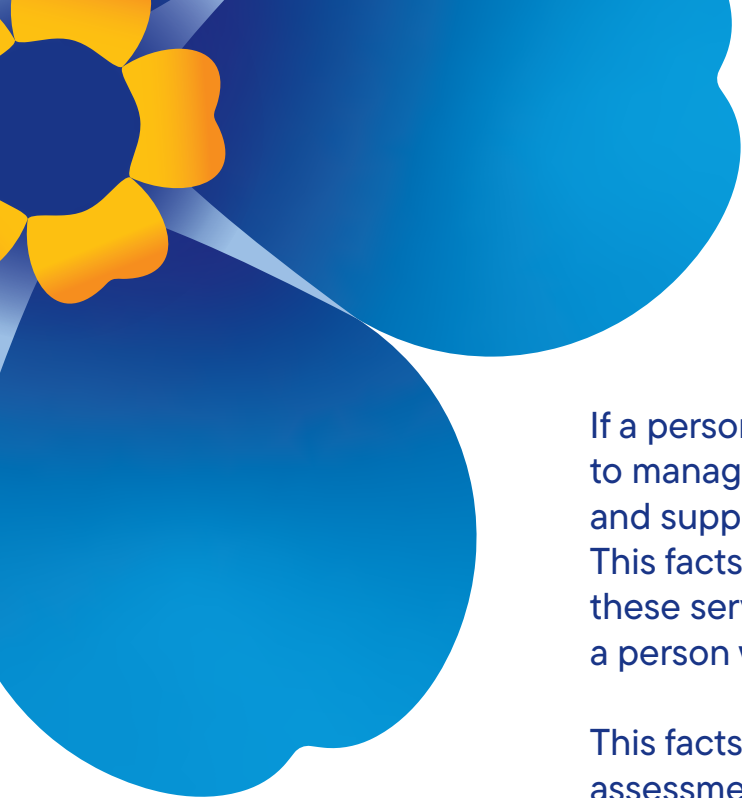


# Assessment for care and support in Wales



**Alzheimer's  
Society**

It will take a society to beat dementia



If a person with dementia or a carer is finding it difficult to manage day-to-day, they may be entitled to care and support services paid for by the local authority. This factsheet for carers explains how you can access these services through either a care assessment for a person with dementia or a carer's assessment.

This factsheet is for people living in Wales, as assessments for care and support are different in England and Northern Ireland. See factsheets 418 for England and NI418 for Northern Ireland.

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## Space for your notes

# 1 What is care and support?

As a carer, the impact of dementia on your daily life can be challenging. As the person's dementia progresses, they will find everyday activities more difficult. You might be supporting them by:

- regularly checking they are safe and comfortable
- cooking and providing meals for them
- driving or going with them to appointments or the shops
- moving them into your home so you can give full-time support.

However, you may be feeling stressed, anxious, or that you can no longer provide the level of care they need. This can affect the wellbeing of the person with dementia and even put them at risk of harm.

You don't have to manage alone. The point of care and support is to help you as a carer, as well as the person with dementia. This can help you to maintain your health and wellbeing as well as carry on caring for the person.

**Care and support** is available from your local authority. This includes practical services and financial advice for both of you. The local authority can also provide help to support you both emotionally.

It may be difficult to think about asking for support, especially if you feel like you and the person you support have been coping well. Support can be tailored to meet your needs now and adapted or increased in the future.

In order to find out what support and care is needed, the first step is arranging an assessment. There are two different assessments with similar-sounding names. They are different in who they are used for:

- A **care assessment** is for a person with dementia.
- A **carer's assessment** is for a carer.

A care assessment for a person with dementia may be called different things by different organisations. This includes a 'care needs assessment' or a 'social care assessment'.

## Space for your notes

Everyone has unique needs, so the type of care and support will be different from person to person. For a person with dementia, examples of care and support could be:

- someone visiting their home to help prepare meals
- help with dressing or washing
- attending a day centre or other activities in the community.

For you, as a carer, care and support could be:

- training to help with your caring role, for example training to move and handle the person you care for, or training to use any specialist equipment
- providing additional services to the person so that you can have a break
- advice about your finances and benefits you could be entitled to as a carer.

There is no charge for either assessment and anyone who may have care and support needs is entitled to have one. Preparing for the assessments will help you understand what needs the person with dementia has, and what needs you may have as a carer. It will also help you to start thinking about what care and support will help.

## 2 Arranging an assessment for care and support

Space for  
your notes

You can ask for a care assessment or carer's assessment directly from your local authority's adult services or social services department. You can find the department's contact details:

- online
- at your GP surgery
- on a Council tax bill
- at local carers organisations at the local library
- through the PALS (Patient Advice and Liaison) team or through staff involved in the person's discharge (if the person is in hospital).

The person with dementia can ask for a care assessment themselves or you can do this for them. Other people can also arrange a care assessment on behalf of the person with dementia. These include:

- the person's GP, consultant or another health or social care professional such as an occupational therapist
- a carer or relative
- a hospital social worker (if the person is in hospital).

If you ask for a care assessment on behalf of the person with dementia, you must get their consent first. You can get consent by checking that the person agrees to you requesting this. Some people with dementia may lack the ability (mental capacity) to give consent. You can then ask for an assessment if it is in the person's best interests. For more information, see factsheet 460 **Mental Capacity Act 2005**.

Speak to your local authority and ask for information and advice as soon as possible. You could start by looking at your local council website to see what support is available and how to get in contact. The information will help you to plan ahead for care and support. This will give you both more time to explore your options. It will also help with planning for emergencies or preparing for times when you may not be able to provide care.

## Space for your notes



**They did point out to me that I could get the local authority health care to pay for a sitter to be with my other half for 3 hrs per week, if wanted. I got the forms and applied.**

Partner of a person with dementia



## Who pays for care and support?

You have to meet certain criteria (conditions) to have care and support provided by the local authority. There are different criteria for the care assessment and a carer's assessment. In addition, the local authority will undertake a financial assessment for each person. The adult services or social services department will use this to decide if and how much it will pay towards care and support for a person with dementia or their carer. There are different ways this can happen:

- The local authority will provide and fully pay for the care and support of some people.
- Some people will pay towards their care and support and the local authority will also pay towards it.
- Some people may have to pay in full for their care and support themselves.

The local authority cannot refuse to carry out an assessment, even if they think the person will have to pay for their own care and support. If the local authority does not pay towards the care and support, the information in the assessment can still be helpful. You can use the information to discuss care and support needs with other organisations and companies, such as home care agencies. See section 'Financial assessments and care charges in Wales' on pages 13–14.

## 3 The criteria for a care assessment

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Anyone with dementia can get a care assessment. It should identify the person's needs and what support would meet these needs. It also helps the local authority to decide if it will pay towards meeting these needs.

The care assessment will identify if the person with dementia has one or more 'eligible care needs'. A person must have an eligible care need for the local authority to consider paying for their care and support.

### Criteria for eligible care needs

There are four criteria (conditions) that apply across Wales. The local authority uses them to decide whether a person is eligible for care and support. These are:

- 1 The person's needs are due to their physical or mental health, age or disability (this includes dementia).**
- 2 The person's needs mean they are unable to do at least one of the following:**
  - carry out self-care or domestic routines – such as cooking meals or bathing
  - communicate
  - protect themselves from abuse or neglect
  - be involved in work, education, learning or in leisure activities – such as volunteering or going swimming.
  - maintain or develop family or other personal relationships – such as spending time with friends
  - maintain and develop social relationships and involvement in the community – such as going to the library or local shops
  - carry out caring responsibilities to a child.
- 3 The person doesn't have a carer or community support to meet their needs, or they can't meet them on their own.**
- 4 The person is unlikely to meet their needs without support from the local authority.**

After the assessment, the local authority may decide that the person with dementia does not have an eligible care need. If you or the person believes they do, you will need to make a complaint (see section 9 'Complaints' on page 17).

## Space for your notes

# 4 Getting a care assessment

The local authority's social services or adult services department carries out most assessments. The assessor is normally a social worker or care coordinator. They may ask to involve other professionals, for example, the person's doctor. In some places, the local authority allows other professionals to do this, such as someone from a carers' centre.

## What to expect at the care assessment

A care assessment will usually involve answering questions as part of a discussion. The assessment is designed to find out the person with dementia's 'personal outcomes'.

'Personal outcomes' are tasks and activities the person with dementia wants to do daily or weekly. For example, the person may want to cook and eat in their own home and would like support to do this. The assessment considers five key things:

- **the person's circumstances** – for example, do they have any mental or physical health conditions (including dementia) and do they live alone?
- **the person's outcomes** – what does the person want to be able to do? For example, go shopping or to see friends
- **any barriers to the person achieving those outcomes** – for example, any mobility problems
- **the risks to the person if the outcomes are not achieved** – for example, they may feel isolated or depressed if they can't see friends, or they may become ill if they are unable to buy food
- **the person's strengths and capabilities** – such as being able to manage their money or joining in with social events.

Everyone at the assessment will discuss the answers. However, not all assessments are done face-to-face and may be done through a self-assessment questionnaire.

## Self-assessment questionnaire

Sometimes an assessment is done through a questionnaire that the person with dementia completes themselves. They may need help to fill this out. You or a social worker can help make sure that all their needs are considered, or you can also ask the local authority for support. Some local charities, such as a carers' centre, may also help with this.

## Space for your notes

## Assessments in Welsh

You and the person with dementia have a right to have the assessment in Welsh. The local authority must meet this request and this should not delay the assessment. Alzheimer's Society produces information in Welsh, including helpsheets and factsheets on other topics. For more information, visit [alzheimers.org.uk/publications](http://alzheimers.org.uk/publications)

### Where the care assessment takes place

A face-to-face care assessment usually takes place in the person's home. This can help the assessor understand what care and support the person needs. If the assessment is arranged elsewhere, it should be somewhere convenient for the person and you.

### The care assessment: tips

The tips below can help the person with dementia get more from the assessment. Use the suggestions to make notes or comments on relevant details. Make sure to share these in the assessment.

- **Create a daily diary for a few weeks.** Include tasks the person needs help with.
- **Make a list of any medicines the person is taking.** Include what conditions they are for.
- **Collect any letters from the GP or other professionals.** This is called 'supporting evidence', such as a GP letter suggesting ramps if the person has problems with walking.
- **Are there carers or relatives that the person would like at the assessment?** Check if they are available to attend.
- **Do they follow any cultural or religious practices?** They may have dietary requirements, such as being a vegetarian, or may regularly visit a place of worship.
- **What support do they get from family and carers?** Even if these people carry on giving care and support, the assessment should cover what would happen if they could no longer do this. It's also important to mention if anyone is finding it difficult to provide care or meet the person's needs.
- **Is there any equipment or assistive technology that would help?** This could be an automated pill dispenser or smart home systems. For more information see factsheet 437 **Using technology to help with everyday life.**
- **Is there any care and support given by professionals that would help?** This could include care and support from a care organisation, support groups, or day centres.
- **What care and support might they need in the future as their dementia progresses?** This can include support from other people as well as equipment and assistive technology.

## Space for your notes

### During the care assessment

- **Be honest.** Some people feel uncomfortable talking to professionals about their problems. The assessor will be used to discussing things like incontinence and changes in behaviour. Being open will help the person with dementia get the best results from their assessment.
- **Tell the assessor if there are things the person wants to do.** For example:
  - be more active
  - stay living at home for as long as possible
  - attend groups and events to engage with other people
  - get help with activities such as shopping or going for walks.

## 5 Support for carers: carer's assessment criteria

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Anyone who provides regular, unpaid care to a person with dementia can get an assessment of their needs as a carer. This includes multiple people caring for the same person.

A carer's assessment should identify what your needs are and work out what type of support would help. You can still have a carer's assessment, even if the person you care for refuses an assessment or doesn't want care or support.

Everyone needs support from time to time. For more information, see factsheet 523 **Carers – looking after yourself** and booklet 600 **Caring for a person with dementia: A practical guide**. For advice, call our Dementia Support Line on **0333 150 3456**.

If you meet certain eligibility criteria (conditions), the local authority may pay for your support. Even if the person you are caring for is self-funding their care, you may still be able to receive support.

### Eligible care needs for carers

The carer's assessment will identify if you have an 'eligible care need' to receive care and support. Once the assessment is complete, the local authority will carry out a financial assessment to decide if they have a duty to meet your needs.

For more information on the financial assessment see 'Financial assessments and care charges in Wales' on pages 13–14 or factsheet W532 **Paying for care and support in Wales**.

After the assessment, you may be told you are not eligible to get your support funded by the local authority because you do not meet the criteria. If you feel you do, you will need to make a complaint (see section 9 'Complaints' on page 17).

## Space for your notes

There are four criteria (conditions) that a carer must meet to be eligible for local authority funded care or support:

- 1 The carer has a need because they are providing care to a person with dementia.**
- 2 As a result of providing care, the carer is unable to do at least one of the following:**
  - carry out self-care or domestic routines such as cooking or cleaning
  - communicate
  - protect themselves from abuse or neglect
  - be involved in work, education, learning or leisure activities such as volunteering or swimming
  - maintain or develop family or other relationships, for example with friends
  - maintain or develop social relationships and involvement in the community
  - care for a child.
- 3 The carer doesn't have someone to help them or community support to meet their needs, or they can't meet them on their own.**
- 4 The carer is unlikely to achieve their outcomes without support from the local authority.**

“

**A visit from a carer three times a day to give meds and make a meal and a hot drink would probably help a lot.**

Family member of a person with dementia

”

## 6 Getting a carer's assessment

Space for  
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A carer's assessment is often carried out at the same time as a care assessment for the person with dementia. This can be helpful as your needs may be met by support provided to the person you care for. For example, if you need a short break from your caring role, the local authority could offer respite care to the person with dementia. For more information, on respite care in Wales, see factsheet W462 **Respite care in Wales**.

Speak to the local authority to arrange your carer's assessment. See section 2 'Arranging an assessment for care and support' on pages 3–4 for details on how to contact them.

### What to expect at the carer's assessment

A social worker usually carries out the assessment. Alternatively, the local authority may ask another organisation to carry out the assessment. For example, this could be a local voluntary group such as a carers' centre. The assessment may also involve other health professionals, such as a GP. The assessor will arrange this if needed.

At the carer's assessment, you will have the opportunity to explain what you do as a carer. You can say what help and support you would like.

### Self-assessment questionnaire

Sometimes the local authority will ask for information through a self-assessment questionnaire. You can ask them for support completing this if you need to. Some local charities may also help with this.

### Where the carer's assessment takes place

The carer's assessment is likely to take place in the home of the person with dementia. However, a carer's assessment may also take place separately from the person with dementia's care assessment. Or the person with dementia may not be having an assessment at all. In this case, the carer's assessment should take place somewhere that is convenient for you.

## Space for your notes

### The carer's assessment: tips

There are a few things you can do to prepare for a carer's assessment. Look through the questions and take your time to think about your answers.

The tips below can help you prepare and get more from your assessment. Think about the support you need. Use the suggestions to make notes or comments on relevant details. Make sure to share these in the assessment.

- **Create a diary for a few weeks and include all the tasks that you do to support the person with dementia.** This could include helping them with washing and dressing or doing their shopping.
- **List the care and support that you give the person including when, where and for how long.** Include details on any time you spend checking on the person's wellbeing. Or times you respond to phone calls to support them.
- **List any benefits you or the person you are supporting get.** The assessor may be able to suggest other benefits if appropriate. If you are not receiving any benefits and think you should be, you can ask the assessor for more information.
- **What care and support can you continue to provide?** You should not feel pressured into providing care that you are not willing or able to give.
- **Do you find your caring role difficult at times?** Mention the occasions when you feel irritable, stressed or depressed. If appropriate, include any physical health problems caused by your caring role.
- **Are there things you can't do or find difficult as a result of caring?** You may not have time to clean your home, go to work or see your friends.
- **Think about what support would help you now and in the future, as the person's dementia progresses.** This could be arranging respite care so you can have a break. Or practical help, such as equipment or training.
- **Be open and honest.** You might find it difficult to talk about how you feel at first, but remember that the assessor is there to support you. To get the best results from your assessment, they need to understand how you are managing.

## 7 Organising care and support

If an assessment shows that support is needed, the local authority looks at how best to put this in place. They will firstly carry out a financial assessment.

### Financial assessments and care charges in Wales

There is a maximum weekly charge for homecare in Wales. This is currently set at £100 per week but this amount may change in the future. This is the maximum weekly charge for anyone, regardless of how much care you need and how much capital and income you have.

'Income' refers to any money you receive regularly, for example, benefits or a pension. 'Capital' refers to any other assets you have, including savings and investments. You may pay less than the maximum weekly charge if your care costs less, or you have below £24,000 in capital, or you are below a certain income level.

There is no maximum weekly charge for residential care. The capital limit is also different to homecare and is currently set at £50,000. This means if you have above this limit, you will usually pay your own residential care fees. If you have £50,000 or under, you should keep your capital and only be expected to contribute from your income.

If you feel that the charges are unreasonable or the financial assessment has not been done properly, you can ask the local authority for a breakdown of costs and an explanation of how the decision was made. You can also speak to them about your concerns.

If you think the charges are wrong, you may want to get further information and advice (see 'Other useful organisations' on page 18). You may also want to make a complaint about the charges by following the local authority's complaints route (see 'Complaints' on page 17).

For more information about financial assessments, see factsheet W532 **Paying for care and support in Wales**.

## Space for your notes

### Direct payments

Direct payments can offer more choice and flexibility when choosing products and services to meet the person with dementia's needs. An example could be selecting their care agency or choosing to have a male or female carer, or requesting a carer that can speak a specific language.

The local authority may also agree to use a direct payment to pay family members who live in the same household as the person with dementia to provide care if this is the best way to meet the person's needs.

The Social Services and Wellbeing (Wales) Act 2014 allows people to use direct payments to pay for long-term residential care as well as other services.

For specific information on direct payments in Wales, see the [wales.gov.uk](http://wales.gov.uk) website.

### Care and support plans

If the care assessment shows the person with dementia has eligible needs, they will receive a care and support plan from the local authority. The plan lists the person's needs and how to meet them. For example, if a person needs support at mealtimes, the care and support plan would state that a care worker should visit them to help during meals.

As a carer, you will also get a care and support plan if you are eligible. This will outline support that is specifically for you. This could include counselling for you or training, such as manual lifting and handling to help you support the person.

A carer's assessment may also lead to changes in the care and support plan for the person with dementia. Sometimes, your needs can be met by providing services to the person you care for. An example is respite care – where a paid care worker spends time with the person with dementia, so you can take a break. Although the change is there to help you, it will be applied to the care plan of the person with dementia.

A care and support plan must name the person who will coordinate the preparation, reviews, delivery and revision of the plan. Often this will be the person that carried out the assessment. This is someone you can speak to about the care and support plan.

## How care and support is arranged

The main ways the local authority arranges care and support are:

- giving the support directly
- arranging for a care provider, such as a homecare agency
- making a direct payment to the person or their carer to buy their own care and support.

Care and support can also be arranged as a combination of these options. How this will be arranged is usually discussed in the assessment and should be in the care and support plan.

The local authority must give you information on where to get local care and support, even if they are not paying for the care. This information can include advice from professionals such as an occupational therapist or a social worker.

You can also get information from local care agencies and charities. The Care Inspectorate Wales lists all registered homecare agencies (see 'Other useful organisations' on pages 18–19).

Some services, such as community nursing, are arranged through the GP. This can be done directly or after a discussion with your local authority's adult services or social services department.

### Space for your notes

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**Social services have stepped in and from Monday will be going in each evening to administer the evening meds.**

Family member of a person with dementia

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## Space for your notes

# 8 Reviews

Over time, your circumstances and the person with dementia's circumstances will change. Your local authority will arrange a review meeting to see whether the services you receive are still meeting both your needs.

Care and support plans must contain a review date. The date must be within 12 months of when the care plan was originally agreed. If the person's needs have changed or it becomes clear that the support isn't working before 12 months, you can request an early review.

There are different ways to get a review:

- **A planned review** is discussed and agreed in the initial care plan.
- **An unplanned review** is normally the result of a change in circumstances, such as a hospital admission or a fall that means the person is less able to do things.
- **A requested review** is where the person, their carer or a professional (for example their GP) asks for a review. This may be due to a change in care needs or when it is felt that different support is needed.

## 9 Complaints

If you need to make a complaint about the assessment process, it's best to try and solve this with the person you're in contact with, such as the social worker. A discussion may resolve a breakdown in communication or a misunderstanding.

If this doesn't work, local authorities have complaints procedures to follow. They will explain how to use this.

The complaints procedure might be appropriate if:

- there are problems arranging an assessment
- there is an unreasonably long wait for an assessment
- someone is told that they are not eligible for care and support, and you or they feel that they are eligible
- the required services are not provided, or are unsatisfactory.

Contact the local authority to find out what their complaints procedure is. If the local authority's complaints procedure does not resolve the issue, you can take your complaint to the Public Services Ombudsman for Wales. It may be helpful to talk to a local advice agency first, for example Citizens Advice Cymru (see 'Other useful organisations' on pages 18–19).

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## Space for your notes

# Other useful organisations

### **Age Cymru**

0300 303 4498 (advice line, 9am–4pm Monday–Friday)  
advice@agecymru.org.uk  
www.ageuk.org.uk/cymru

Information and advice for older people in Wales.

### **The Association of Lifetime Lawyers**

020 8234 6186 (9am–5pm Monday–Friday)  
www.lifetimelawyers.org.uk

This organisation (formerly Solicitors for the Elderly) is an independent, national organisation of lawyers who provide legal advice to older people. They can also help you to find a solicitor.

### **Care Inspectorate Wales**

0300 7900 126 (9am–5pm Monday–Thursday,  
9am–4.30pm Friday)  
ciw@gov.wales  
www.careinspectorate.wales

The Care Inspectorate Wales regulates, inspects and reviews all adult social care services in Wales.

### **Carers UK**

0808 808 7777 (helpline, 9am–6pm Monday–Friday)  
advice@carersuk.org  
www.carersuk.org/wales

Advice, information and support about caring. This includes information on paying for care.

### **Citizens Advice Cymru**

0800 702 2020 (helpline, 8am–7pm Monday–Friday,  
9am–1pm Saturday)  
www.citizensadvice.org.uk/wales

Free, confidential and impartial advice on debt, benefits, employment, housing and discrimination. To find your local Citizens advice, use the website or look in the phone book.

### **Disability Rights UK**

0330 995 0400 (general enquiries line)  
enquiries@disabilityrightsuk.org  
www.disabilityrightsuk.org

Disability Rights UK is an organisation of disabled people working for equal participation for all.

**GOV.UK**

[www.gov.uk](http://www.gov.uk)

GOV.UK is the website for information and services from the UK government, including information about paying for care.

**Independent Age**

0800 319 6789 (helpline, 8.30am–5.30pm Monday–Friday)

[helpline@independentage.org](mailto:helpline@independentage.org)

[www.independentage.org](http://www.independentage.org)

Information and advice service for older people, their families and carers, focusing on social care, welfare benefits and befriending services.

**Older People's Commissioner for Wales**

03442 640670 (9am–5pm Monday–Friday)

[ask@olderpeople.wales](mailto:ask@olderpeople.wales)

[www.olderpeople.wales](http://www.olderpeople.wales)

The Older People's Commissioner for Wales protects and promotes the rights of people aged 60 and over. You will find useful information, publications and guidance on a range of matters that are important for older people on the Commissioner's website. The Commissioner's Advice and Assistance team can help to connect you with support and services throughout Wales, and help to ensure your rights are upheld.

**Public Services Ombudsman for Wales**

0300 790 0203 (phone line, 10am–12.30pm and 1.30pm–4pm)

[ask@ombudsman.wales](mailto:ask@ombudsman.wales)

[www.ombudsman.wales](http://www.ombudsman.wales)

Public Services Ombudsman for Wales is an independent organisation that investigates complaints about public services, and independent care providers, and looks for a resolution.

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Factsheet W418

Last reviewed: February 2024

Next review due: February 2027

This factsheet has been reviewed by people affected by dementia.

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To give feedback on this factsheet, or for a list of sources, please email [publications@alzheimers.org.uk](mailto:publications@alzheimers.org.uk)

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At Alzheimer's Society we're working towards a world where dementia no longer devastates lives. We do this by giving help to everyone who needs it today, and hope for everyone in the future.

We have more information on **Needing greater support with care.**

For advice and support on this, or any other aspect of dementia, call us on **0333 150 3456** or visit **alzheimers.org.uk**

Thanks to your donations, we're able to be a vital source of support and a powerful force for change for everyone living with dementia. Help us do even more, call **0330 333 0804** or visit **alzheimers.org.uk/donate**



**Alzheimer's  
Society**

It will take a society to beat dementia

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London EC3N 2AE

**0330 333 0804**  
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**alzheimers.org.uk**

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