Housing needs assessment form template

#### A flexible tool to support hospital discharge planning

This tool has been designed to support the hospital to home discharge protocol. Like the protocol, it is not intended to be adopted in its entirety (unless this is helpful); rather, it provides a template that can be adapted to align with or strengthen local requirements and processes.

It is suggested that the completion of the person’s housing needs assessment should be co-ordinated by a named professional as soon as possible after an autistic person or a person with a learning disability is admitted to a mental health inpatient hospital. This could either be someone named by the integrated care board (ICB) with overall responsibility for hospital discharge planning, the lead key worker in the hospital, a social worker or some other person identified specifically to take the lead on housing planning, reporting to the overall hospital discharge co-ordinator.

The person co-ordinating the housing needs assessment could also be someone with specialist housing expertise, such a local authority housing officer, though in practice it is more likely to be someone with wider responsibility for planning for the person’s discharge or with other relevant expertise (for example, an advocate, a social worker, an occupational therapist, or a hospital-based clinician, depending on local processes and procedures).

If the co-ordinating professional is not a housing expert, it is recommended that a local housing specialist should be involved from the outset, recognising that a level of housing knowledge will be required to collect all the relevant information. Ideally, this would include proactive support from the local authorities with housing responsibility. Once a housing provider has been identified, they are also likely to be able to support personalised housing planning around the needs of the person.

Once completed, the information should be sent to the commissioners of the person’s care, to the overall hospital discharge co-ordinator (if different) and to the registered provider (the housing provider), once identified. It should continue to be reviewed during the person’s admission, as the professionals get to know the person, and learn from listening to them, and to those who are close to them.

It is essential that from the very outset, all housing needs assessment activities are completed in partnership with the person who needs to be discharged from hospital, and their family, friends, carers, and any advocates who may be involved.

Useful resources to support this can be found via the Learning Disability England People and families online housing guide.

|  |
| --- |
| Individual housing needs assessment – hospital to home planning |
| **Section 1. The person**  |
| Name  |  |
| Date of hospital admission |  |
| Date housing needs assessment started |  |
| Estimated date of discharge  |  |
| NHS number |  |
| Date of birth |  |
| Current address (prior to admission) / no fixed address |  |
| Is it likely that the person's discharge date will be delayed? | Y/N – add any comments |
| If a delay is likely, has this been escalated to relevant oversight group? | Y/N – any comments here, and add actions to Section 10 |
| **Section 2. Current housing / living situation (before hospital admission)** |
| **Accommodation type (please tick one option)** |
| Social rented property (not supported housing) |  | Private rented property (not supported housing) |  |
| Owned property with mortgage |  | [Shared ownership property, eg HOLD](https://www.bing.com/ck/a?!&&p=a10e83cbc9aec16eJmltdHM9MTY4OTIwNjQwMCZpZ3VpZD0yMjZmM2Q3ZC05NzJiLTYwOTQtM2FhMi0yZmI4OTZlNDYxMWEmaW5zaWQ9NTE5Ng&ptn=3&hsh=3&fclid=226f3d7d-972b-6094-3aa2-2fb896e4611a&psq=hold+shared+ownership+scheme&u=a1aHR0cHM6Ly93d3cub3dueW91cmhvbWUuZ292LnVrL3NjaGVtZS9ob2xkLw&ntb=1) |  |
| Owned property – no mortgage |  | Social rented supported housing – own front door |  |
| Shared social rented supported housing (room in shared house) |  | Older person’s sheltered housing or extra care housing / housing with care |  |
| Living in family home (that is, person not named on tenancy / house deeds) |  | [Shared Lives[[1]](#endnote-2) or adult placement scheme](https://www.bing.com/ck/a?!&&p=1770aeb0eff4ca91JmltdHM9MTY4OTIwNjQwMCZpZ3VpZD0yMjZmM2Q3ZC05NzJiLTYwOTQtM2FhMi0yZmI4OTZlNDYxMWEmaW5zaWQ9NTIxNw&ptn=3&hsh=3&fclid=226f3d7d-972b-6094-3aa2-2fb896e4611a&psq=shared+lives&u=a1aHR0cHM6Ly93d3cubmhzLnVrL2NvbmRpdGlvbnMvc29jaWFsLWNhcmUtYW5kLXN1cHBvcnQtZ3VpZGUvY2FyZS1zZXJ2aWNlcy1lcXVpcG1lbnQtYW5kLWNhcmUtaG9tZXMvc2hhcmVkLWxpdmVzLXNjaGVtZXMv&ntb=1) |  |
| Residential / nursing care home |  | No fixed address |  |
| Other / any comments  |
| **Other information (add comments / explanation as needed)** |
| Name and address of landlord (if rented / shared ownership) |  |
| If supported housing, give name / address of support / care provider |  |
| Name of local authority with housing responsibility  |  |
| Name of local authority with social care responsibility  |  |
| Is the person in receipt of housing benefit? (Housing component of Universal Credit)  | Y/N  |
| Is the person in receipt of other benefits, including [Disability Living Allowance (DLA)[[2]](#endnote-3) / Personal Independence Payment (PIP)](https://www.bing.com/ck/a?!&&p=fe326640b8feeb93JmltdHM9MTY4OTIwNjQwMCZpZ3VpZD0yMjZmM2Q3ZC05NzJiLTYwOTQtM2FhMi0yZmI4OTZlNDYxMWEmaW5zaWQ9NTIzMg&ptn=3&hsh=3&fclid=226f3d7d-972b-6094-3aa2-2fb896e4611a&psq=disability+living+allowance+pip&u=a1aHR0cHM6Ly93d3cuZ292LnVrL2dvdmVybm1lbnQvcHVibGljYXRpb25zL2Rpc2FiaWxpdHktbGl2aW5nLWFsbG93YW5jZS1hbmQtcGVyc29uYWwtaW5kZXBlbmRlbmNlLXBheW1lbnQtbWFpbi1kaWZmZXJlbmNlcy9kaXNhYmlsaXR5LWxpdmluZy1hbGxvd2FuY2UtYW5kLXBlcnNvbmFsLWluZGVwZW5kZW5jZS1wYXltZW50LXRoZS1tYWluLWRpZmZlcmVuY2Vz&ntb=1)[[3]](#endnote-4)? These will need to be reinstated once the person leaves hospital. |  |
| If the person owns (or part owns) their home with a mortgage in place, check whether and how mortgage payments are being covered while the person is in hospital and any action needed to secure this (add any comments as needed). |
| If rent payments are at risk, or the person’s current property is not in a good state of repair, contact the landlord to agree a course of action to secure the property and maintain if applicable. For more information, see [Housing Benefit guidance for supported housing claims](https://www.bing.com/ck/a?!&&p=3d61645ca71bfbb1JmltdHM9MTY4OTIwNjQwMCZpZ3VpZD0yMjZmM2Q3ZC05NzJiLTYwOTQtM2FhMi0yZmI4OTZlNDYxMWEmaW5zaWQ9NTIxMQ&ptn=3&hsh=3&fclid=226f3d7d-972b-6094-3aa2-2fb896e4611a&psq=housing+benefit+guidance+supported+housing&u=a1aHR0cHM6Ly93d3cuZ292LnVrL2dvdmVybm1lbnQvcHVibGljYXRpb25zL2hvdXNpbmctYmVuZWZpdC1ndWlkYW5jZS1mb3Itc3VwcG9ydGVkLWhvdXNpbmctY2xhaW1zL2hvdXNpbmctYmVuZWZpdC1ndWlkYW5jZS1mb3Itc3VwcG9ydGVkLWhvdXNpbmctY2xhaW1z&ntb=1). |
| If the person already has a care provider, liaise with them to ensure the person’s care and support arrangements are secure (if applicable and in the best interests of the person) and that a joint plan across housing and care is in place for when the person returns home. |
| If it is not possible for the person to return to their previous home on discharge from hospital, please give the reason for this. |
| **Section 3. New housing / accommodation needs, if required post-discharge (it is suggested that details are added as person-centred planning develops)** |
| Location (where person needs / wants to live) |  |
| Reason why identified location is preferred |  |
| Number of bedrooms needed – usually one for single person / couple; state reasons if extra bedrooms needed |  |
| Any extra rooms needed for other purposes (eg sensory or education room or staff accommodation) |  |
| Mobility needs to be considered (any help or adaptations to support the person to physically move around) |  |
| Sensory profile completed (to capture the sensory needs the person may have)? |  |
| Assistive technology required |  |
| Specific housing needs[[4]](#endnote-5)  |  |
| Type of location requirements[[5]](#endnote-6) |  |
| Adjustments to the physical environment required (supported by occupational therapist) – [(Safe Home Environment Assessment (SHEA) tool](https://www.nice.org.uk/sharedlearning/a-safe-home-is-still-a-home))[[6]](#endnote-7) |  |
| Any general comments on housing and accommodation requirements: |
| **Type of accommodation sought (please select one or more options under consideration, depending on person’s needs / local circumstances)** |
| Independently owned / rented home, separate care provision (not supported living) |  | Home with own front door and shared support / facilities, eg ‘core and cluster’ supported housing |  |
| Shared supported living (that is, tenancy in shared property, own bedroom, shared areas / care) |  | Shared Lives / adult placement / supported lodgings |  |
| Family home (that is, with parents / partner, etc) |  | Residential / nursing care (give reasons / specific needs) |  |
| Extra care / sheltered housing) for older people  |  | Other (describe) |
| Any general comments on type of accommodation sought: |
| **Section 4. If housing is required (that is, not a care or nursing home)**  |
| **Question** | **Comments / notes** |
| If applying for social housing, can person demonstrate a ‘local connection’ to their preferred location?[[7]](#endnote-8) Liaise with local housing authority |  |
| Does the person have access to finances, assets or the right to take on the rent of an existing local authority or housing association property, which could offer them potential housing options? |  |
| Has person’s name been added to local social housing waiting list?[[8]](#endnote-9),[[9]](#endnote-10) Liaise with local housing authority |  |
| Is person flagged as homeless (with priority housing need)?[[10]](#endnote-11) Liaise with local housing authority |  |
| Contact made with any registered (housing) providers already? If yes, please state which providers and the outcome | Y/N and any comments |
| **Preferred housing tenure / type sought (tick one or more options)** |
| Social rented property (not supported housing) |  | Private rented property (not supported housing) |  |
| Shared ownership property (eg HOLD) |  | Purchased property (with / without mortgage) |  |
| Vacancy in existing supported living / property  |  | Live with family or partner in their existing home |  |
| [Shared Lives](https://www.nhs.uk/conditions/social-care-and-support-guide/care-services-equipment-and-care-homes/shared-lives-schemes/) / adult placement  |  | Sheltered or extra care housing |  |
| What is the plan for sourcing property, if required; eg new build, modular build, sourcing an existing property with adaptations if needed (describe planned approach and any key partners involved – keep under review):Add any agreed actions to Section 10. |
| Have housing requirements been communicated to local housing authority and health / social care commissioners, to support strategic planning for future housing needs? | Y/N – if no, suggest this is recorded as an action in Section 10 |
| **Section 5. Capital funding plans if needed – tick all that apply**  |
| [Homes England / Greater London Authority](https://www.london.gov.uk/programmes-strategies/housing-and-land/homes-londoners-affordable-homes-programmes/homes-londoners-affordable-homes-programme-2021-2026) Affordable Housing Programme |  | Other Homes England / Greater London Authority delivered funding |  |
| [NHS England housing capital funding](https://www.bing.com/ck/a?!&&p=53438646cde3ee3dJmltdHM9MTY4OTIwNjQwMCZpZ3VpZD0yMjZmM2Q3ZC05NzJiLTYwOTQtM2FhMi0yZmI4OTZlNDYxMWEmaW5zaWQ9NTIyMQ&ptn=3&hsh=3&fclid=226f3d7d-972b-6094-3aa2-2fb896e4611a&psq=NHSE+housing&u=a1aHR0cHM6Ly93d3cuZW5nbGFuZC5uaHMudWsvbGVhcm5pbmctZGlzYWJpbGl0aWVzL2NhcmUvaG91c2luZy8&ntb=1) |  | Other public contribution (eg free / low cost land, local authority / ICB funding, s106 developer contributions[[11]](#endnote-12)) |  |
| Social housing provider contribution |  | [Disabled Facilities Grant (for adaptations)](https://www.bing.com/ck/a?!&&p=5b8c1f9455ae5cd5JmltdHM9MTY4OTIwNjQwMCZpZ3VpZD0yMjZmM2Q3ZC05NzJiLTYwOTQtM2FhMi0yZmI4OTZlNDYxMWEmaW5zaWQ9NTIwMg&ptn=3&hsh=3&fclid=226f3d7d-972b-6094-3aa2-2fb896e4611a&psq=disabled+facilities+grant&u=a1aHR0cHM6Ly93d3cuZ292LnVrL2Rpc2FibGVkLWZhY2lsaXRpZXMtZ3JhbnRz&ntb=1) |  |
| Other investment source (give details) |  |  |
| General comments on capital funding sources: |
| **Section 6. Other actions / assessments to be considered alongside housing needs – tick if applicable, attach report / add details as relevant** |
| Actions from CTR / CETR meetings |  | Life planning actions |  |
| Occupational therapy (OT) assessment / SHEA tool / actions |  | Person-centred care assessment / actions |  |
| Sensory needs profile / actions |  | Assistive technology assessment / actions |  |
| General comments or other actions arising from relevant plans / assessments: |
| **Section 7. Tenancy and revenue funding – complete if housing is required**[[12]](#endnote-13) |
| Does the person have capacity to sign a tenancy agreement under the Mental Capacity Act?[[13]](#endnote-14),[[14]](#endnote-15) | Y/N – if no, record actions in section 10[[15]](#endnote-16) |
| Is there an appointed deputy in place under the Court of Protection or a Lasting Power of Attorney registered for care and finance with the Office of the Public Guardian? | Y/N – if yes, provide details |
| If the person has s117 aftercare funding, does their s117 care plan identify supported accommodation as one of the services required?[[16]](#endnote-17) | Y/N – if yes, provide details |
| If rented housing identified, have proposed rent levels been agreed with housing benefits team?[[17]](#endnote-18) | Y/N – if no, it is suggested this should be identified as an action. Record actions in section 10 |
| General comments on tenancy or revenue funding issues: |
| **Section 8. Are the following standards met in identified housing:** |
| Standards as set out in the [National Statement of Expectations for supported housing](https://www.bing.com/ck/a?!&&p=e5e564831e0d6c50JmltdHM9MTY4OTIwNjQwMCZpZ3VpZD0yMjZmM2Q3ZC05NzJiLTYwOTQtM2FhMi0yZmI4OTZlNDYxMWEmaW5zaWQ9NTE5NQ&ptn=3&hsh=3&fclid=226f3d7d-972b-6094-3aa2-2fb896e4611a&psq=national+statement+of+expectations&u=a1aHR0cHM6Ly93d3cuZ292LnVrL2dvdmVybm1lbnQvcHVibGljYXRpb25zL3N1cHBvcnRlZC1ob3VzaW5nLW5hdGlvbmFsLXN0YXRlbWVudC1vZi1leHBlY3RhdGlvbnM&ntb=1)? |
| Standards set out in [CQC regulations for supported living and services for autistic people and people with a learning disability](https://www.cqc.org.uk/guidance-providers/autistic-people-learning-disability/right-support-right-care-right-culture)? |
| Standards set out in [NICE guidance: Learning disabilities and behaviour that challenges: service design and deliver](https://www.nice.org.uk/guidance/ng93) |
| [REACH standards for supported living?](https://www.bing.com/ck/a?!&&p=43aea2ca0a25e357JmltdHM9MTY4OTIwNjQwMCZpZ3VpZD0yMjZmM2Q3ZC05NzJiLTYwOTQtM2FhMi0yZmI4OTZlNDYxMWEmaW5zaWQ9NTE5NQ&ptn=3&hsh=3&fclid=226f3d7d-972b-6094-3aa2-2fb896e4611a&psq=reach+standards&u=a1aHR0cHM6Ly9wYXJhZGlnbS11ay5vcmcvd2hhdC13ZS1kby9yZWFjaC1zdXBwb3J0LWZvci1saXZpbmcv&ntb=1)  |
| Clear separation between housing (and the person’s tenancy rights), and the commissioning of care and support [(Real Tenancy Test)](https://www.bing.com/ck/a?!&&p=867630e06d67fa81JmltdHM9MTY4OTIwNjQwMCZpZ3VpZD0yMjZmM2Q3ZC05NzJiLTYwOTQtM2FhMi0yZmI4OTZlNDYxMWEmaW5zaWQ9NTE4OQ&ptn=3&hsh=3&fclid=226f3d7d-972b-6094-3aa2-2fb896e4611a&psq=real+tenancy+test&u=a1aHR0cHM6Ly93d3cubmR0aS5vcmcudWsvcmVzb3VyY2VzL3RoZS1yZWFsLXRlbmFuY3ktdGVzdDE&ntb=1)? |
| Is funding via a lease-based model or Real Estate Investment Trust?[[18]](#endnote-19)  |
| Where standards not met / concerns raised, are you assured that it remains a suitable housing setting? What mitigation will be put into place? Consider seeking additional assurance (add any comments): |
| **Section 9. Keeping on track**  |
| Has a clear timeline been agreed for identifying and setting up the housing required (if applicable)? | Y/N – make any comments here, and add actions to Section 10 |
| Is there a realistic project plan agreed, and clear roles and responsibilities identified to deliver the housing required? | Y/N – make any comments here, and add actions to Section 10 |
| **Section 10. Recommended actions – add to list as required** |
| **Action** | **Responsible lead** | **Deadline**  |
| 1. |  |  |
| 2. |  |  |
| 3. |  |  |
| 4. |  |  |

1. [Shared Lives Plus](https://sharedlivesplus.org.uk/) [↑](#endnote-ref-2)
2. <https://www.gov.uk/dla-disability-living-allowance-benefit/your-DLA-claim> [↑](#endnote-ref-3)
3. [Personal Independence Payment (PIP): What PIP is for - GOV.UK](https://www.gov.uk/pip) [↑](#endnote-ref-4)
4. For example, to live alone / with others, any sensory or environmental needs, private outdoor space, robust construction / design, not overlooked, single sex (if shared accommodation), any other requirements [↑](#endnote-ref-5)
5. For example, rural / urban, near to amenities / public transport / close relationships / employment, not near a school or children’s play area, any other requirements [↑](#endnote-ref-6)
6. [A Safe Home is Still A Home – NICE](https://www.nice.org.uk/sharedlearning/a-safe-home-is-still-a-home) [↑](#endnote-ref-7)
7. [Providing social housing for local people – GOV.UK](https://www.gov.uk/government/publications/providing-social-housing-for-local-people/providing-social-housing-for-local-people#prioritising-local-connection) [↑](#endnote-ref-8)
8. [Council housing: Apply for a council home - GOV.UK](https://www.gov.uk/council-housing) [↑](#endnote-ref-9)
9. If the person requires housing, adding their name to the local housing waiting list is important. Even if unlikely to result in a housing allocation, this helps local authorities understand the housing needs in their area, and supports discussions where differences are identified between Housing Benefit rates and actual local housing costs. [↑](#endnote-ref-10)
10. [Homelessness code of guidance for local authorities - Chapter 8: Priority need - Guidance – GOV.UK](https://www.gov.uk/guidance/homelessness-code-of-guidance-for-local-authorities/chapter-8-priority-need) [↑](#endnote-ref-11)
11. [Planning obligations – GOV.UK](https://www.gov.uk/guidance/planning-obligations) [↑](#endnote-ref-12)
12. For a guide to current legislation in this area: Ruck Keene A, Davies S, David S, Sullivan R (2022). [Guidance note: Capacity and housing issues](https://www.39essex.com/sites/default/files/Guidance-Note-Capacity-and-Housing-Issues-May-2022.pdf). Essex Chambers [↑](#endnote-ref-13)
13. [Mental Capacity Act Code of Practice – GOV.UK](https://www.gov.uk/government/publications/mental-capacity-act-code-of-practice) [↑](#endnote-ref-14)
14. [Mental Capacity Act - Social care and support guide – NHS](https://www.nhs.uk/conditions/social-care-and-support-guide/making-decisions-for-someone-else/mental-capacity-act/) [↑](#endnote-ref-15)
15. For example, an application may need to be made to the Court of Protection. [↑](#endnote-ref-16)
16. [20 006 910 - Local Government and Social Care Ombudsman](https://www.lgo.org.uk/decisions/health/mental-health-services/20-006-910#point1) [↑](#endnote-ref-17)
17. [Housing Benefit guidance for supported housing claims](https://www.bing.com/ck/a?!&&p=3d61645ca71bfbb1JmltdHM9MTY4OTIwNjQwMCZpZ3VpZD0yMjZmM2Q3ZC05NzJiLTYwOTQtM2FhMi0yZmI4OTZlNDYxMWEmaW5zaWQ9NTIxMQ&ptn=3&hsh=3&fclid=226f3d7d-972b-6094-3aa2-2fb896e4611a&psq=housing+benefit+guidance+supported+housing&u=a1aHR0cHM6Ly93d3cuZ292LnVrL2dvdmVybm1lbnQvcHVibGljYXRpb25zL2hvdXNpbmctYmVuZWZpdC1ndWlkYW5jZS1mb3Itc3VwcG9ydGVkLWhvdXNpbmctY2xhaW1zL2hvdXNpbmctYmVuZWZpdC1ndWlkYW5jZS1mb3Itc3VwcG9ydGVkLWhvdXNpbmctY2xhaW1z&ntb=1) – GOV.UK [↑](#endnote-ref-18)
18. [Specialised supported housing: guidance for local government and NHS commissioners – Local Government Association](https://www.local.gov.uk/publications/specialised-supported-housing-guidance-local-government-and-nhs-commissioners) [↑](#endnote-ref-19)