

Holistic Needs Assessment

Planning your care and support



About this leaflet

This leaflet is about Holistic Needs Assessments (HNAs). An HNA identifies any concerns you may have when you have been diagnosed with cancer. These concerns may be physical, emotional, practical, financial or spiritual. The leaflet explains what happens at an HNA and has information about making a care plan. It is for anyone who has been diagnosed with cancer. We hope it helps you deal with some of the questions or feelings you may have.

How to use this leaflet

This booklet is split into sections to help you find what you need. You do not have to read it from start to finish. You can use the contents list on page 3 to help you.

It is fine to skip parts of the booklet. You can always come back to them when you feel ready.

On pages 24 to 29, there are details of other organisations that can help.

There is also space to write down questions and notes for your doctor or nurse (page 30 to 32).

Quotes

In this leaflet, we have included quotes from people who have had an HNA. These are from people who have chosen to share their story with us. To share your experience, visit [macmillan.org.uk/shareyourstory](https://www.macmillan.org.uk/shareyourstory)

For more information

If you have more questions or would like to talk to someone, call the Macmillan Support Line free on **0808 808 00 00**, 7 days a week, 8am to 8pm, or visit [macmillan.org.uk](https://www.macmillan.org.uk)

If you would prefer to speak to us in another language, interpreters are available. Please tell us, in English, the language you want to use.

If you are deaf or hard of hearing, call us using Relay UK on **18001 0808 808 00 00**, or use the Relay UK app.

We have some information in different languages and formats, including audio, easy read, Braille, large print, interactive PDFs and translations. To order these, visit [macmillan.org.uk/otherformats](https://www.macmillan.org.uk/otherformats) or call **0808 808 00 00**.

Contents

What is an HNA?	4
What are the benefits of having an HNA?	5
What happens at an HNA?	6
Discussing your care	12
About our information	18
Other ways we can help you	20
Other useful organisations	24

What is an HNA?

An Holistic Needs Assessment (HNA) is a discussion you have with someone from your healthcare team. First you fill out an assessment or answer some questions. Then you talk through your needs and concerns with them. You both then agree on a plan for your care and support needs.

It is called holistic because you can discuss any area of your life that has been affected by cancer. An HNA is not only about the physical symptoms of cancer or the side effects of treatment.

These concerns can be:

- physical
- emotional
- practical
- financial
- spiritual.

HNAs may not be offered in all hospitals or GP practices. The HNA may happen in the ways we describe, or it may be more informal. If you are not offered an HNA and would like one, you can ask someone from your healthcare team or your GP about it.

What are the benefits of having an HNA?

Being diagnosed with cancer and coping with its effects on your life may feel overwhelming. You may have lots of questions or worries. Having an HNA can help make sure you get the support you need for these different concerns.

This may include:

- helping you identify the concerns that are most important to you
- getting information and support to help you manage your concerns
 - for example, side effects or support with emotional worries
- helping your healthcare team understand what is important to you
- being referred to other services if you need more help or support
 - for example, physiotherapy, counselling or help with your finances
- helping you to plan ahead.

What happens at an HNA?

An HNA usually has 3 parts:

- 1** Fill in a checklist or answer some simple questions.
- 2** Discuss your answers with a healthcare professional.
- 3** Create a care plan together.

- 1.** You fill in a checklist or answer some simple questions about all areas of your life. This is to find out about the concerns you may have. You are often asked to rate how important these concerns are to you from 1 to 10 – with 1 being the least important and 10 being the most important. This can help you decide what to discuss first during the assessment.
- 2.** You discuss your answers with someone from your healthcare team. This is a chance to talk about the issues that are most important to you.
- 3.** You create a care plan together for managing your concerns. This is sometimes called a personalised care and support plan. If there are simple ways to help you, you may not need a written care plan.

Who do I have the HNA with?

You may have your HNA with someone from your cancer team at the hospital. This is often your clinical nurse specialist (sometimes called your key worker). Or it could be a cancer support worker who works with them.

Or you may have your HNA with someone from your GP practice. This may be your GP, practice nurse, cancer care co-ordinator or another member of the team.

They have the skills and experience to:

- help you identify your needs
- talk about your needs with you.

They also have up-to-date knowledge of local and national services. They can refer you to other support services you may need. They may print out some Macmillan information to give to you.

If you are having a face-to-face assessment, you can take a family member, carer or friend with you. You can ask for an interpreter if you need one.

If you have not been offered an HNA, ask your healthcare team about who can do the HNA with you.

When does the HNA happen?

You may be offered an HNA when you are diagnosed, during treatment or after treatment has ended. If you are not offered an HNA, you can ask someone from your healthcare team to arrange one. Your needs may change over time, so you can ask for another HNA at any time.

You may have a separate appointment for the HNA. Or it may happen during one of your other appointments.

You may be sent the checklist of questions to answer online at home before the HNA. Or you may be asked to complete the checklist in the waiting room beforehand. The checklist may be on paper or a handheld electronic tablet. If it is done on a tablet, it is called an electronic Holistic Needs Assessment (eHNA). If you need help answering the questions or using the tablet, tell the person doing your HNA.

Some people have their HNA as an informal discussion with someone from their healthcare team. It may not always be called an HNA. They may ask you questions and discuss your answers with you, rather than asking you to fill out a form or complete a checklist.

“ Becoming familiar with tools like Holistic Needs Assessments (HNAs) means professionals are able to demonstrate and practice the gold standard in patient care. Asking a patient what matters. ”

Noreen, lead cancer nurse

Where will the HNA happen?

The HNA should be done in a private and comfortable room. It may be done in the hospital or your GP practice. Or it can be done over the phone. It can also be done online in a video call (virtually). You can tell them what you would prefer.

How long will the HNA take?

The HNA usually takes between 30 minutes and 1 hour. Some people need longer. It should take as long as you need to talk about your concerns. If there are still some things you want to talk about after it has finished, tell the person doing your HNA. They can make another appointment with you.



Discussing your care

It can help to think about the concerns you would like to discuss before your HNA.

What the discussion may include

These are your concerns, so it is up to you what you talk about. Some ideas include you:

- physical symptoms – for example, pain, tiredness, bowel or bladder problems, and weight changes
- treatment – for example, side effects, fertility, and the risks and benefits of treatment
- emotions – for example, fear of cancer coming back or the effect of cancer on your relationships
- sexual well-being – for example, concerns about intimacy, getting an erection or low sex drive
- family – for example, how to talk about cancer or worries about genetic risk
- well-being after treatment – for example, stopping smoking, eating healthily or staying active
- follow-up appointments – for example, tests you may need and knowing what symptoms to check for
- work, money and housing – for example, advice about working during treatment, benefits and financial help
- practical issues – for example, how to manage housework, and where to get aids and equipment to help you
- spirituality – for example, your faith or beliefs, and whether your cancer experience has affected these.

For some practical or financial issues, you may be referred to other health or social care services. These will give you further advice and support.

Remember, the concerns we have listed are only a guide. Not everything listed will apply to you. Or you may have concerns that are not listed. We have some suggestions to help you decide what you would like to discuss.

“ Macmillan offers holistic support, they see the full person. I think that’s really important when you’re on a cancer journey. ”

Sarifa, diagnosed with breast cancer

Preparing for your discussion

You may find it helpful to make notes of any concerns or questions you have before the discussion.

You may want to think about these questions:

- Are you coping okay?
- Is cancer affecting your relationships with family or friends?
- Are family or friends coping with your diagnosis?
- Would you like to know more about local services, support groups or helplines?
- Do you need advice about your diet, being physically active or stopping smoking?
- Are you confused by any part of your treatment or follow-up care? Is there anything you would like explained?
- Do you need help with finances, work or education?
- Are you worried about the future?
- Do you feel your quality of life could be improved?
- Are you having any symptoms or side effects from the cancer or treatment?
- Do you know what signs and symptoms to check for and who to contact if you notice any?
- Do you know who to contact if you have any problems? For example, do you have the contact details of your clinical nurse specialist?

Not all these suggestions will be relevant to you. The HNA is about your personal needs and concerns.

Your care plan

During the discussion, you and the person doing your HNA will agree on the best ways to manage your needs and concerns. They may write down what you have agreed in a document called a care plan. This is sometimes called a personalised care and support plan.

It may be written as a letter instead. They may write it during the discussion. Or they may make notes and send them to you afterwards.

Your care plan will record:

- the main concerns you talked about
- suggestions and actions to help you manage your concerns
- services that may be able to support you, and any referrals they make
- what is already being done to help – for example, the services you are already using
- information about who to contact if you need more help
- the details of other health and social care professionals you have agreed to share the information with.

You will be given a copy of your care plan. If you are not offered a copy of your care plan, you can ask for one at any time.

A copy of the care plan may be sent or given to:

- your GP, so they know your concerns and what help is planned
- other members of your healthcare team, to help them plan or improve your care
- specialist support services – for example, a dietitian or counsellor.

The healthcare professional will only share your care plan if you give permission. They will only share as much information as people need to help with your care.

Your care plan will be securely stored with your other health records. You can ask for a review of your care plan, or a new assessment, at any time.

Cancer care review

A cancer care review is a conversation with your GP, practice nurse, cancer care co-ordinator or someone else from your healthcare team. This may happen a few months after being diagnosed, or sometimes later. They will check whether you have any concerns or need any more information or support. Sometimes the cancer care review may be done as another HNA. We have more information about having a cancer care review in our booklet **Life after cancer treatment**.

You can order our booklets and leaflets for free.
Visit **[be.macmillan.org.uk](https://www.be.macmillan.org.uk)** or call us on **0808 808 00 00**.





About our information

We provide expert, up-to-date information about cancer. And all our information is free for everyone.

Our information has the PIF Tick quality mark for trusted health information. This means our information has been through a professional and strong production process.

Order what you need

You may want to order more booklets or leaflets like this one. Visit **be.macmillan.org.uk** or call us on **0808 808 00 00**.

We have booklets about different cancer types, treatments and side effects. We also have information about work, financial issues, diet, life after cancer treatment and information for carers, family and friends.

Online information

All our information is also available online at **macmillan.org.uk/information-and-support** You can also find videos featuring stories from people affected by cancer, and information from health and social care professionals.

Other formats

We also provide information in different languages and formats, including:

- audiobooks
- Braille
- British Sign Language
- easy read booklets
- interactive PDFs
- large print
- translations.

Find out more at [macmillan.org.uk/otherformats](https://www.macmillan.org.uk/otherformats)

If you would like us to produce information in a different format for you, email us at cancerinformationteam@macmillan.org.uk or call us on **0808 808 00 00**.

The language we use

We want everyone affected by cancer to feel our information is written for them.

We try to make sure our information is as clear as possible. We use plain English, avoid jargon, explain any medical words, use illustrations to explain text, and make sure important points are highlighted clearly.

We use gender-inclusive language and talk to our readers as 'you' so that everyone feels included. Where clinically necessary we use the terms 'men' and 'women' or 'male' and 'female'. For example, we do so when talking about parts of the body or mentioning statistics or research about who is affected. Our aims are for our information to be as clear and relevant as possible for everyone.

To find out more about how we produce our information, visit [macmillan.org.uk/ourinfo](https://www.macmillan.org.uk/ourinfo)



Other ways we can help you

At Macmillan, we know how a cancer diagnosis can affect everything, and we are here to support you.

Talk to us

If you or someone you know is affected by cancer, talking about how you feel and sharing your concerns can really help.

Macmillan Support Line

Our free, confidential phone line is open 7 days a week, 8am to 8pm. Call us on **0808 808 00 00**. We can:

- help with any medical questions you have about cancer or your treatment
- help you access benefits and give you financial guidance
- be there to listen if you need someone to talk to
- tell you about services that can help you in your area.

Our trained cancer information advisers can listen and signpost you to further support. Our cancer information nurse specialists can talk you through information about your diagnosis and treatment. They can help you understand what to expect from your diagnosis and provide information to help you manage symptoms and side effects.

If you are deaf or hard of hearing, call us using Relay UK on **18001 0808 808 00 00**, or use the Relay UK app.

You can also email us, or use the Macmillan Chat Service via our website. You can use the chat service to ask our advisers about anything that is worrying you. Tell them what you would like to talk about so they can direct your chat to the right person. Click on the 'Chat to us' button, which appears on pages across the website. Or go to **macmillan.org.uk/talktous**

If you would like to talk to someone in a language other than English, we also offer an interpreter service for our Macmillan Support Line. Call **0808 808 00 00** and say, in English, the language you want to use. Or send us a web chat message saying you would like an interpreter. Let us know the language you need and we'll arrange for an interpreter to contact you.

Macmillan Information and Support Centres

Our Information and Support Centres are based in hospitals, libraries and mobile centres. Visit one to get the information you need and speak with someone face to face. If you would like a private chat, most centres have a room where you can speak with someone confidentially.

Find your nearest centre at **macmillan.org.uk/informationcentres** or call us on **0808 808 00 00**.

Help with money worries

Having cancer can bring extra costs such as hospital parking, travel fares and higher heating bills. If you have been affected in this way, we can help. Please note the opening times may vary by service.

Financial guidance

Our financial team can give you guidance on mortgages, pensions, insurance, borrowing and savings.

Help accessing benefits

Our welfare rights advisers can help you find out what benefits you might be entitled to, and help you complete forms and apply for benefits. They can also tell you more about other financial help that may be available to you. We can also tell you about benefits advisers in your area. Visit [macmillan.org.uk/financialsupport](https://www.macmillan.org.uk/financialsupport) to find out more about how we can help you with your finances.

Help with energy costs

Our energy advisers can help if you have difficulty paying your energy bills (gas, electricity and water). They can help you get access to schemes and charity grants to help with bills, advise you on boiler schemes and help you deal with water companies.

Macmillan Grants

Macmillan offers one-off payments to people with cancer. A grant can be for anything from heating bills or extra clothing, to changes needed to your home.

Call us on **0808 808 00 00** to find out more about Macmillan Grants.

Help with work and cancer

Whether you are an employee, a carer, an employer or are self-employed, we can provide support and information to help you manage cancer at work. Visit [macmillan.org.uk/work](https://www.macmillan.org.uk/work)

Work support

Our dedicated team of work support advisers can help you understand your rights at work. Call us on **0808 808 00 00** to speak to a work support adviser.

Talk to others

No one knows more about the impact cancer can have on your life than those who have been through it themselves. That is why we help bring people together in their communities and online.

Support groups

Whether you are someone living with cancer or a carer, family member or friend, we can help you find support in your local area, so you can speak face to face with people who understand. Find out about support groups in your area by calling us or by visiting **macmillan.org.uk/selfhelpandsupport**

Online Community

Thousands of people use our Online Community to make friends, blog about their experiences and join groups to meet other people going through the same things. You can access it any time of day or night. Share your experiences, ask questions, or just read through people's posts at **macmillan.org.uk/community**

You can also use our Ask an Expert service on the Online Community. You can ask a financial guide, cancer information nurse, work support advisor or an information and support advisor any questions you have.

Macmillan healthcare professionals

Our nurses, doctors and other health and social care professionals give expert care and support to individuals and their families. Call us or ask your GP, consultant, district nurse or hospital ward sister if there are any Macmillan professionals near you.

Other useful organisations

There are lots of other organisations that can give you information or support. Details correct at time of printing.

General cancer support organisations

Cancer Black Care

Tel **0734 047 1970**

www.cancerblackcare.org.uk

Offers UK-wide information and support for people from Black and minority ethnic communities who have cancer. Also supports their friends, carers and families.

Cancer Focus Northern Ireland

Helpline **0800 783 3339**

www.cancerfocusni.org

Offers a variety of services to people affected by cancer in Northern Ireland.

Cancer Research UK

Helpline **0808 800 4040**

www.cancerresearchuk.org

A UK-wide organisation that has patient information on all types of cancer. Also has a clinical trials database.

Cancer Support Scotland

Tel **0800 652 4531**

www.cancersupportscotland.org

Runs cancer support groups throughout Scotland. Also offers free complementary therapies and counselling to anyone affected by cancer.

Macmillan Cancer Voices

www.macmillan.org.uk/cancervoices

A UK-wide network that enables people who have or have had cancer, and those close to them such as family and carers, to speak out about their experience of cancer.

Maggie's

Tel **0300 123 1801**

www.maggies.org

Has a network of centres in many locations throughout the UK. Provides free information about cancer and financial benefits. Also offers emotional and social support to people with cancer, their family and friends.

Emotional and mental health support

Breathing Space

Tel **0800 838 587**

www.breathingspace.scot

A free, confidential phone and web-based service for people in Scotland experiencing low mood, depression or anxiety.

British Association for Counselling and Psychotherapy (BACP)

Tel **0145 588 3300**

www.bacp.co.uk

Promotes awareness of counselling and signposts people to appropriate services across the UK. You can also search for a qualified counsellor on the 'How to find a therapist' page.

Mind

Helpline **0300 123 3393**

www.mind.org.uk

Provides information, advice and support to anyone with a mental health problem through its helpline and website.

Samaritans

Helpline **116 123**

Email **jo@samaritans.org**

www.samaritans.org

Provides confidential and non-judgemental emotional support, 24 hours a day, 365 days a year, for people experiencing feelings of distress or despair.

General health information

Drinkaware

www.drinkaware.co.uk

Provides independent alcohol advice, information and tools to help people make better choices about their drinking. Also has a web chat, for anyone concerned about their own drinking, or someone else's.

Health and Social Care in Northern Ireland

www.northerntrust.hscni.net

Provides information about health and social care services in Northern Ireland.

NHS.UK

www.nhs.uk

The UK's biggest health information website. Has service information for England.

NHS 111 Wales

111.wales.nhs.uk

The NHS health information site for Wales.

NHS Inform

Helpline **0800 224 488**

www.nhsinform.scot

The NHS health information site for Scotland.

Patient UK

www.patient.info

Provides people in the UK with information about health and disease. Includes evidence-based information leaflets on a wide variety of medical and health topics. Also reviews and links to many health-related and illness-related websites.

LGBT-specific support

LGBT Foundation

Tel **0345 330 3030**

lgbt.foundation

Provides a range of services to the LGBT community, including a helpline, email advice and counselling. The website has information on various topics including sexual health, relationships, mental health, community groups and events.

OUTpatients (formerly called Live Through This)

www.outpatients.org.uk

A safe space for anybody who identifies as part of the queer spectrum and has had an experience with any kind of cancer at any stage. Also produces resources about LGBT cancer experiences. OUTpatients runs a peer support group with Maggie's Barts.

Financial support or legal advice and information

Advice NI

Helpline **0800 915 4604**

www.adviceni.net

Provides advice on a variety of issues including financial, legal, housing and employment issues.

Citizens Advice

Provides advice on a variety of issues including financial, legal, housing and employment issues. Use its online webchat or find details for your local office by contacting:

England

Helpline **0800 144 8848**

www.citizensadvice.org.uk

Scotland

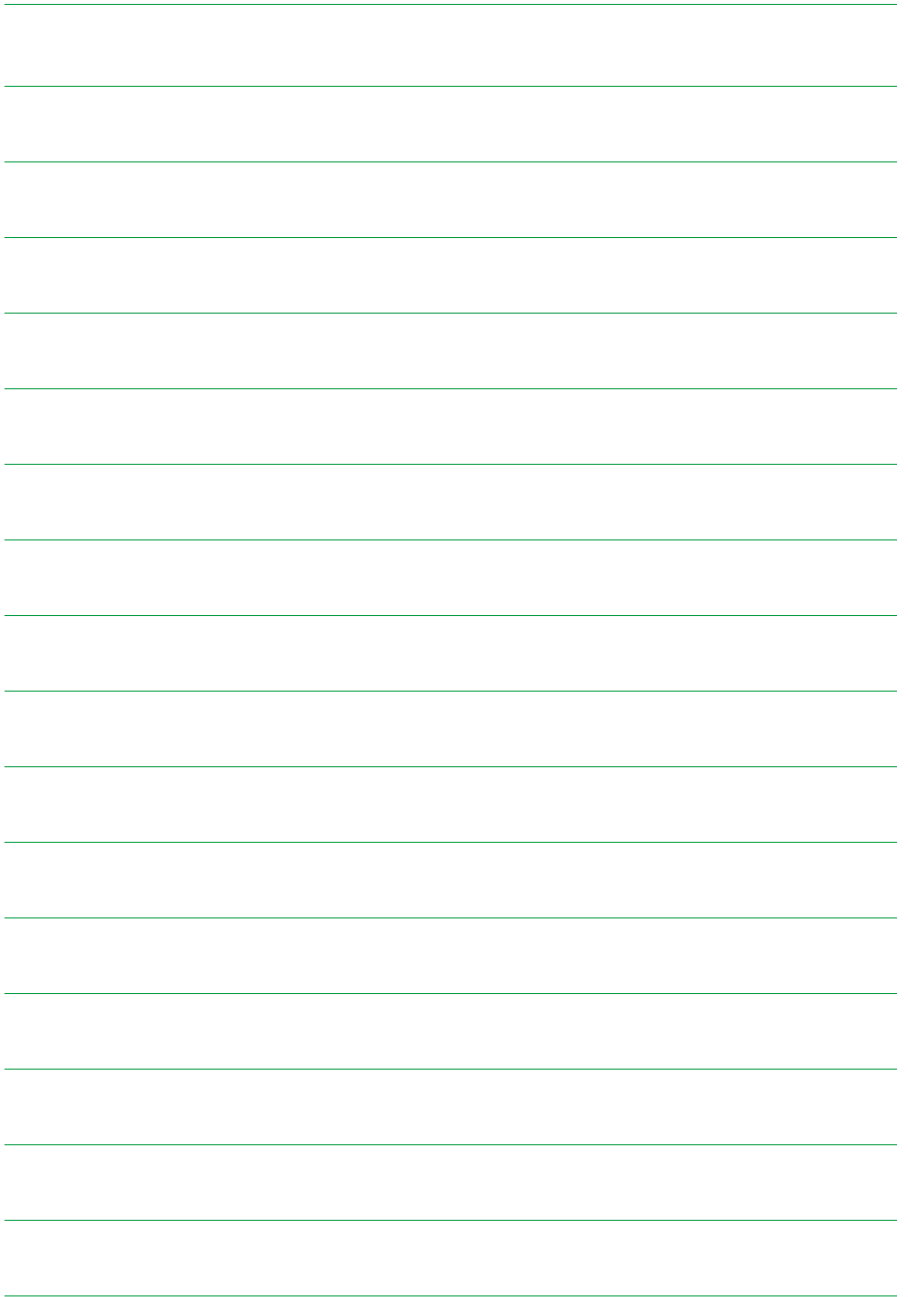
Helpline **0800 028 1456**

www.cas.org.uk

Wales

Helpline **0800 702 2020**

www.citizensadvice.org.uk/wales



Disclaimer

We make every effort to ensure that the information we provide is accurate and up to date, but it should not be relied upon as a substitute for specialist professional advice tailored to your situation. So far as is permitted by law, Macmillan does not accept liability in relation to the use of any information contained in this publication, or third-party information or websites included or referred to in it. Some photos are of models.

Thanks

This leaflet has been written, revised and edited by Macmillan Cancer Support's Cancer Information Development team. It has been approved by members of Macmillan's Centre of Clinical Expertise.

With thanks to: Lisa Castellaro, Macmillan Haematology Clinical Nurse Specialist; Annabelle Cracknell Jones, Radiographer and Macmillan Senior PSFU Allied Healthcare Professional; and Michelle Taylor, Macmillan Clinical Nurse Specialist Personalised Care Team Lead.

Thanks also to the people affected by cancer who reviewed this edition, and those who shared their stories.

We welcome feedback on our information. If you have any, please contact **cancerinformationteam@macmillan.org.uk**

Sources

Below is a sample of the sources used in our information about Holistic Needs Assessments (HNAs). If you would like more information about the sources we use, please contact us at **cancerinformationteam@macmillan.org.uk**

Macmillan Cancer Support. Written evidence submitted by Macmillan Cancer Support (ESC0026). 2022. Available from www.committees.parliament.uk/writtenevidence/43574/pdf [accessed April 2023].

Vaz-Luis I, Masiero M, Cavaletti G, Cervantes A, Chlebowski RT, Curigliano G, et al. ESMO expert consensus statements on cancer survivorship: promoting high-quality survivorship care and research in Europe. *Annals of Oncology*. 2022;33(11): 1119–1133. Available from www.doi.org/10.1016/j.annonc.2022.07.1941 [accessed April 2023].

Williamson S, Hack TF, Bangee M, Benedetto V, Beaver K. The patient needs assessment in cancer care: identifying barriers and facilitators to implementation in the UK and Canada. *Supportive Care in Cancer*. 2021;29(2): 805–812. Available from www.doi.org/10.1007/s00520-020-05542-6 [accessed April 2023].

Can you do something to help?

We hope this leaflet has been useful to you. It is just one of our many publications that are available free to anyone affected by cancer. They are produced by our cancer information specialists who, along with our nurses, benefits advisers, campaigners and volunteers, are part of the Macmillan team. When people are facing the toughest fight of their lives, we are here to support them every step of the way.

We want to make sure no one has to go through cancer alone, so we need more people to help us. When the time is right for you, here are some ways in which you can become a part of our team.

5 ways you can help someone with cancer

1. Share your cancer experience

Support people living with cancer by telling your story, online, in the media or face to face.

2. Campaign for change

We need your help to make sure everyone gets the right support. Take an action, big or small, for better cancer care.

3. Help someone in your community

A lift to an appointment. Help with the shopping.
Or just a cup of tea and a chat. Could you lend a hand?

4. Raise money

Whatever you like doing you can raise money to help. Take part in one of our events or create your own.

5. Give money

Big or small, every penny helps.
To make a one-off donation see over.

Please fill in your personal details

Mr/Mrs/Miss/Other

Name

Surname

Address

Postcode

Phone

Email

Please accept my gift of £
(Please delete as appropriate)

I enclose a cheque / postal order /
Charity Voucher made payable to
Macmillan Cancer Support

OR debit my:

Visa / MasterCard / CAF Charity
Card / Switch / Maestro

Card number

Valid from

Expiry date

Issue no

Security number

Signature

Date / /

Do not let the taxman keep your money

Do you pay tax? If so, your gift will be worth 25% more to us – at no extra cost to you. All you have to do is tick the box below, and the tax office will give 25p for every pound you give.

I am a UK tax payer and I would like Macmillan Cancer Support to treat all donations I make or have made to Macmillan Cancer Support in the last 4 years as Gift Aid donations, until I notify you otherwise.

I understand that if I pay less Income Tax and/or Capital Gains Tax than the amount of Gift Aid claimed on all my donations in that tax year it is my responsibility to pay any difference. I understand Macmillan Cancer Support will reclaim 25p of tax on every £1 that I give.

Macmillan Cancer Support and our trading companies would like to hold your details in order to contact you about our fundraising, campaigning and services for people affected by cancer. If you would prefer us not to use your details in this way please tick this box.

In order to carry out our work we may need to pass your details to agents or partners who act on our behalf.

If you would rather donate online go to macmillan.org.uk/donate



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**FUNDRAISING
REGULATOR**



**This leaflet is about Holistic Needs Assessments (HNAs).
An HNA identifies any concerns you may have
when you are diagnosed with cancer. These may
be physical, emotional, practical, financial or spiritual.**

The leaflet talks about what happens at an HNA and has information about making a care plan.


At Macmillan, we give people with cancer everything we've got. If you are diagnosed, your worries are our worries. We will help you live life as fully as you can.

For information, support or just someone to talk to, call **0808 808 00 00** or visit **macmillan.org.uk**

Would you prefer to speak to us in another language? Interpreters are available. Please tell us in English the language you would like to use. If you are deaf or hard of hearing, call us using Relay UK on **18001 0808 808 00 00**, or use the Relay UK app.

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Patient Information Forum