

Notice of Instruction
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Notice of Instruction Number: 061413 - Clarification to NOI #061203 - cw

TO: PSA 6 Service Providers

FROM: Katie Parkinson, Vice President of ADRC & Program Management

DATE: June 14, 2013

SUBJECT: Clarification of Notice of Instruction: Internet Based DOEA 701B Comprehensive Assessment Form Training and Certification

The purpose of this Notice is to provide clarification to the WCFAAA Notice of Instruction #: 061213 – Revised 701B Assessment with regards to training and certification requirements for the new DOEA 701B Comprehensive Assessment Form and sub-assessment forms. To accommodate the concerns of the Aging Network regarding time constraints, the Department of Elder Affairs has changed the implementation date for use of the new form from July 1, 2013, to July 16, 2013. All Aging Network staff responsible for conducting 701B assessments, including sub-assessment forms 701A, 701C, and 701S must use the new forms beginning July 16, 2013.

The sub-assessment forms are defined as follows:

- The 701A form is intended to be administered face-to-face for non-case managed clients in Local Service Programs and Older Americans Act programs.
- The 701C is intended to be administered for congregate meal clients.
- The 701S is intended to be administered over the telephone for waitlist management, and includes the initial screening and re-screening of individuals.

To accomplish the required training and certification, please note the following adjustments:

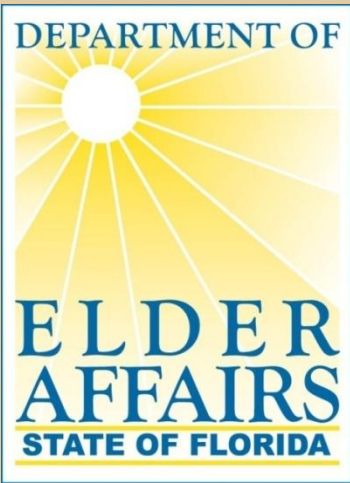
- Case management lead agency staff who administer the 701B will need to complete the web-based training before July 16, 2013.
- Congregate meal site staff administering the 701C will not complete the web-based training. Rather, the providers must ensure staff receive training prior to Tuesday, July 16, 2013, by viewing the attached PowerPoint presentation entitled, "701C Congregate Meals Assessment," which highlights the changes of the new assessment.
- Provider staff administering the 701A will not complete the web-based training immediately. Rather, staff are to be trained prior to Tuesday, July 16, 2013, by viewing the attached PowerPoint presentation entitled, "Your Inside Look at the Priority Score and Rank Criteria on the DOEA Screening (701S), Condensed Assessment (701A) and Comprehensive Assessment (701B) Forms," which highlights the changes of the new assessment related to the priority score and rank criteria.
- Providers are to transmit verification to their WCFAAA Program Manager that all required staff administering the 701A, 701B and 701C received the required training as outlined in this notice. Please include which training the staff member received and documentation to confirm that the training was actually provided (i.e. Certificate with staff name and Provider Training Log). Verification that all training was completed in a timely manner is due to WCFAAA on or before Friday, July 19, 2013.

Thank you for your assistance and cooperation as we implement the new Assessment Forms. If you have any questions, please contact your WCFAAA Program Manager.

Attachments:

701C Presentation – Congregate Meal Assessment Training

Priority Score Training – Your Inside Look at Priority Score Rank Criteria



701C CONGREGATE MEALS ASSESSMENT

Introduction - 701C

- The 701C is intended to be administered for congregate meal clients.
- The 701D Instructions (a companion manual for the 701B form) also apply to any questions from the 701B that also appear on the other assessment and screening forms, such as the 701C.

Overview of Changes to the DOEA 701C

- Includes changes in the following areas:
 - ▣ Demographics
 - ▣ Activities for Daily Living
 - ▣ Instrumental Activities of Daily Living
 - ▣ Nutrition

Changes in Demographics

□ Item 10 - Limited English Proficiency (LEP)

10. Does client have limited ability reading, writing, speaking, or understanding English? No Yes

- Mark the appropriate box to indicate whether the client has limited ability to read, write, or speak in the English language, or to understand spoken English ("No" or "Yes"). This can be due to the client's primary language being other than English, literacy issues, or physical impairments.

Changes in Demographics

□ Item 11 – Marital Status

11. Marital status: Married Partnered Single Separated Divorced Widowed

■ Select from the listed options. Obtain the client's response and mark the appropriate box to indicate the client's current marital status:

- “Married:” An individual who has a legal husband or wife.
- “Partnered:” An individual who is in a relationship with a person, other than a legal spouse.
- “Single:” An individual who has never been married.
- “Separated:” An individual who is legally married, but is living apart from their spouse.
- “Divorced:” An individual whose marriage has been legally dissolved.
- “Widowed:” An individual whose spouse died while they were still married.

Changes in Demographics

□ Item 20 – Living Situation

20. Living situation: With primary caregiver With other caregiver With other Alone

- Mark the appropriate box to indicate the client's current living situation (“With primary caregiver,” “With caregiver,” “With other,” “Alone”). If the client is in a facility, the response would be “Alone.”
 - With Primary Caregiver (WC) - Consumer lives with the primary caregiver
 - With Other Caregiver – Consumer lives with a caregiver that is not the primary caregiver
 - With Other (WO) - Consumer lives with anyone other than a caregiver.
 - Alone (AL) - Consumer lives alone. This includes consumers living in an *ALF or nursing facility.

Changes in Demographics

□ Item 26 – Do You Need Other Assistance For Food?

26. Do you need other assistance for food?

No

Yes

Mark the appropriate box to indicate whether the client needs other assistance for food (“No” or “Yes”). The client may not be eligible for S/NAP (Food Stamps) but still need help in obtaining food. Other sources of food assistance could be local food pantries, religious groups, or service organizations.

Changes in Demographics

□ Item 27 – ASSESSOR/CM: Client Answering Questions?

27. ASSESSOR/CM: Is someone besides the client providing answers to questions? No (skip to 28) Yes

a. Name: _____

b. Relationship: _____

- Mark the appropriate box to indicate whether someone besides the client is providing answers to the questions in the assessment (“No” or “Yes”).
 - If someone else is not providing answers (“No”), skip a-b.
 - If someone else is providing answers (“Yes”), indicate the **name** of the person as well as **their relationship** to the client in spaces a. and b.

Changes in Demographics

□ Item 28 – Children the client lives with and provides care for

28. Besides your own children, how many children under age 19 do you live with and provide care for?
(if 0, skip to 29) _____ #

a. How many are grandchildren?	#	Name(s):
b. How many are other related children?	#	Name(s):
c. How many are other non-related children?	#	Name(s):

- Indicate the total number of children, besides the client's own children, under age 19 that live with and are cared for by the client by entering a number on the line provided.
 - If the response is zero, skip a-c.
 - If the response is one or more, enter the number and name(s) in items a-c.
 - If any number response is zero in a-c, leave the name(s) blank.

Changes in Demographics

- Item 29 - Disabled adults the client lives with and provides care for

29. How many disabled adults age 19 to 59 do you live with and provide care for? (if 0, skip to 30) #

a. How many are grandchildren? # Name(s):

b. How many are other relatives? # Name(s):

c. How many are other non-relatives? # Name(s):

- Indicate the total number of disabled adults, aged 19 to 59 that live with and are cared for by the client by entering a number in the box provided.
 - If the response is zero, skip a-c.
 - If the response is one or more, enter the number and name(s) in items a-c.
 - If any number response is zero in a-c, leave the name(s) blank

Changes in Activities of Daily Living (ADLs)

□ Item 30 – Activities of Daily Living

30. How much assistance do you need with the following tasks?

Task	No assistance needed	Uses assistive device	Needs supervision or prompt	Needs assistance (but not total help)	Needs total assistance (cannot do at all)
a. Eating	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Preparing meals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Shopping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Ask the client how much assistance s/he needs with completing the tasks listed on the form for activities a-c, and determine the amount of help needed.

Changes in Activities of Daily Living (ADLs)

□ Item 30 Continued...

■ Determine the amount of help needed from the following range:

- “No assistance needed:” Indicates that client needs no help to perform any part of the activity.
- “Uses assistive device:” Indicates that the client needs an assistive device or technology to complete the activity.
- “Needs supervision or prompt:” Indicates that the client needs reminders or supervision during the activity. Otherwise s/he needs no physical help to perform the activity.
- “Needs assistance (but not total help):” Indicates that the client needs hands-on physical help during part of the activity.
- “Needs total assistance (cannot do at all):” Indicates that the client cannot complete activity without total physical assistance.

Changes in Instrumental Activities of Daily Living (IADL)

□ Item 31 – Instrumental Activities of Daily Living

31. How much assistance do you have with the following tasks?

Task	No assistance needed	Always has assistance	Has assistance most of the time	Rarely has assistance	Never has assistance
a. Eating	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Preparing meals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Shopping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Assessing the frequency a client has assistance with a task is different from identifying how much assistance the client needs. You will ask the client how much assistance they have with completing the tasks listed on the form for activities a-c, and determine the frequency of help they have.

Changes in Instrumental Activities of Daily Living (IADL)

□ Item 31 Continued...

■ Determine the frequency of help they have using the following range:

- “No assistance needed:” Indicates that client receives no help from others because they do not need any help to perform any part of the activity.
- “Always has assistance:” Indicates that the client always has an adequate level of help to meet their need in performing the activity.
- “Has assistance most of the time:” Indicates that the client usually has the help they need to perform the activity, or more often than not they have an adequate level of help for the activity.
- “Rarely has assistance:” Indicates that the client has unpredictable, unreliable or seldom has the amount of assistance they need to complete the activity.
- “Never has assistance:” Indicates that the client has absolutely no assistance to complete the activity.

Changes in Nutrition

□ Item 34 – Liquid Intake

34. How many cups of water, juice, or other liquid do you drink daily? *(If more than eight, skip to 35)*

#

a. Do you ever limit the amount of fluids you drink?

No

Yes

- Ask the client how many cups of water, juice, or other liquid s/he drinks daily. If the response is more than eight, skip question a. If the response is less than eight, ask question a.

Changes in Nutrition

□ Item 34 – Fruits/Vegetable Intake

35. On average, how many servings of fruits and vegetables do you eat every day? (One “serving” is one small piece of fruit or vegetable, about one-half cup of chopped fruit or vegetable, or one-half cup of fruit or vegetable juice.) #

- Read the description of serving size and then ask the client how many servings of fruits and vegetables s/he eats every day, on average. Record the numerical response in the box.

Changes in Nutrition

□ Item 36 – Dairy Intake

36. On average, how many servings of dairy products do you have every day? (One "serving" of dairy is about a slice of cheese, a cup of yogurt, or a cup of milk or dairy substitute.) #

- ▣ Read the description of serving size and then ask the client how many servings of dairy products s/he has every day, on average. Record the numerical response in the box.

Changes in Nutrition

□ Item 38 – Gained/Lost Weight

38. Have you lost or gained weight in the last few months? Unsure (*skip to 39*) No (*skip to 39*) Yes
- a. How much? Less than five pounds Five to ten pounds Ten pounds or more
- b. Was the weight loss/gain on purpose (*i.e. dieting or trying to lose/gain weight*)? No Yes

- Ask the client if s/he has lost or gained weight in the last few months and mark the appropriate response (“Unsure,” “No,” or “Yes”).
 - a. Amount of Weight: Ask how much weight the client has lost or gained in the last few months and mark the appropriate response (“Less than 5 pounds,” “5 to 10 pounds,” or “10 pounds or more”).
 - b. Purposeful Change: Ask the client whether the weight gain/loss was on purpose – for example, whether they were trying to lose or gain weight, and record the response (“No” or “Yes”). An unintended weight change could indicate a health problem, and the client’s doctor should be notified.

Changes in Nutrition

□ Item 41 – Working Appliances

41. What working appliances do you have for storing/preparing food?

None Refrigerator Microwave Toaster/Oven Stove Other:

- Indicate what working appliances, if any, the client has for storing/preparing food (“None,” “Refrigerator,” “Microwave,” “Toaster/Oven,” “Stove,” or “Other”). Be sure to note any “other” source that is not listed on the form in the space provided. More than one item can be checked; the intent is to capture all sources the client has for storing and preparing food. If the response is “None,” the Assessor/Case Manager needs to ask the client how they store and prepare food.

Changes in Nutrition

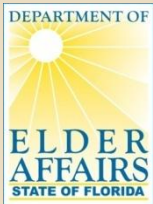
□ Item 43 – Alcohol Use

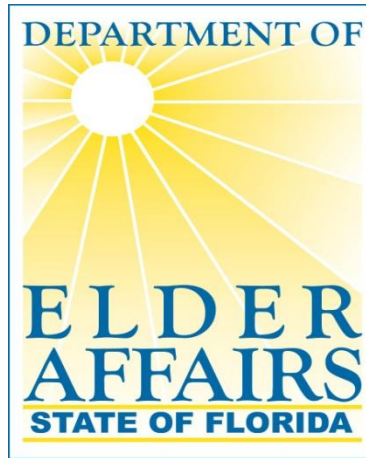
43. How many days in a typical week do you drink alcohol? Refused (*skip a*) None (*skip a*)
 One to two Three to five Six to seven

- Ask the client how many days in a typical week s/he drinks alcohol and record the response in the appropriate box (“Refused,” “None,” “1 to 2,” “3 to 5,” or “6 to 7”).

Contact Us

- Please send all questions to:
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Your Inside Look at Priority Score and Rank Criteria on the DOEA Screening (701S), Condensed Assessment (701A) and Comprehensive Assessment (701B) Forms

June 2013

New Screening (701S), Condensed Assessment (701A), and Comprehensive Assessment (701B)

- DOEA has new forms for Screening and Assessment as follows:
- 701S Screening
- 701A Condensed Assessment
- 701B Comprehensive Assessment
- Effective July 16, 2013

- This Priority Score and Rank Criteria presentation is updated to reflect the changes on the new Screening and Assessment tools.

- Changes are highlighted in **RED**.

Welcome to DOEA's Priority Score/Rank Review Training

This training addresses questions that result from the priority score and rank generated by the Client Information and Registration Tracking System (CIRTS) when a DOEA **701S**, 701A, or 701B Form is entered into CIRTS.

DOEA Forms **701S**, 701A, and 701B are used to conduct screenings and assessments for applicants and recipients of DOEA-funded programs and services.

This training is designed to help screeners and assessors apply standard criteria when recording responses to the priority score items during the screening or assessment process.

This training incorporates scenarios and feedback from Lead Agencies, Aging and Disability Resource Centers (ADRCs), and Comprehensive Assessment and Review for Long Term Care Services (CARES).

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Priority Score

The **priority score** compares persons who are assessed or screened according to some basic factors.

Persons with the highest scores need services quickly in order to remain in the community.

The priority score factors are:

- Whether or not the person lives alone;
- Whether or not the person has a caregiver to provide some care, caregiver's health status, caregiver's ability to continue to provide care, and whether the caregiver is in crisis;
- The person's present health and how it compares to the prior year;
- How much the person's health affects them doing what they want to do;
- How much assistance the person needs with Activities of Daily Living (ADLs) and Instrumental Activities of Daily Living (IADLs); and
- The health care resources available to the consumer, including access to health care and medications.

CARES ASSESSMENT GUIDANCE – Nursing Facility Clients

- CARES determines the feasibility of the resident's discharge based on the medical needs, as well as the resident's inclination to return to a community-based setting.
- If the individual resides in a nursing facility, assisted living facility (ALF), or adult family care home and plans to return home or to an alternate setting, the assistance that will be available in that setting should be recorded.

CARES ASSESSMENT GUIDANCE – Nursing Facility Transitions

- Once CARES staff identify or receive a referral for nursing facility transition, an on-site assessment in the nursing facility will be conducted to complete or update a 701B (unless current within 90 days and is still accurate).
- The 701B assessment is completed based on what the consumer's living situation will be after discharge from the nursing facility.
- If the consumer is returning to the community, the 701B should reflect the situation in the home, ALF, etc.



Questions, Definitions, and Scenarios

Is there a Primary Caregiver?

Possible answers:

Yes (Y)

No (N)

A **primary caregiver** is any person who cares for someone on a regular basis and:

1. Can be depended on to provide help as needed with ADLs and IADLs;
 - Provides direct assistance with ADLs and/or IADLs on a regular and consistent basis; or
 - Is responsible to arrange, coordinate, and make decisions regarding direct assistance with ADLs and/or IADLs on behalf of a consumer.
2. May or may not live with the consumer; and
3. Does not include an operator of an Assisted Living Facility (ALF), nursing facility, Adult Family Care Home (AFCH) sponsor, home health agency, or service provider staff.

Scenario:

Ms. C's 64-year-old son lives next door to her. She tells the assessor that her son is her primary caregiver. He manages her money, makes home repairs, and does heavy chores. Ms. C has arthritis and needs help in the morning getting dressed, putting on make-up, and brushing her hair. Her son is not comfortable assisting his mother with these morning activities, so he is seeking outside assistance to help with her personal care.

Question:

Can a son be a primary caregiver if he provides some, but not all assistance needed?

Answer:

Yes. The son is a primary caregiver because his mother depends on him to provide direct assistance with her needs. It is acceptable for a primary caregiver to live in a separate dwelling and ask for or receive outside assistance for some care giving tasks.

Living Situation

Possible answers:

With Primary Caregiver (WC) - Consumer lives with the primary caregiver

With Other Caregiver - Consumer lives with a caregiver that is not the primary caregiver

With Other (WO) - Consumer lives with anyone other than a caregiver.

Alone (AL) - Consumer lives alone. This includes consumers living in an *ALF or nursing facility.

*Consumers who live in an ALF or nursing facility have a range of services available to them that are better captured in the section of the assessment that addresses ADLs and IADLs than in the section that addresses Living Situation.

Scenario:

For the last several years, Ms. T has rented out the guest quarters of her home to her granddaughter. In the last year, Ms. T has been forgetting to take her medication and mismanaging her money, resulting in the granddaughter quitting her job to take care of her full-time.

Question:

How has Ms. T's living situation changed?

Answer:

Although in the previous years assessment, Ms. T lived “with other”, the new answer is “with caregiver.” Ms. T's living situation has changed because her reliance upon her granddaughter has increased from tenant to primary caregiver.

Caregiver Health: Considering other aspects of your life, rate the level of difficulty in your physical health?

(answered by the primary caregiver)

Possible answers:

No difficulty

Little difficulty

Some difficulty

Moderate difficulty

A lot of difficulty

This question is meant to be a subjective reflection by the caregiver about his/her overall opinion of his/her own health. This opinion can be relative to other people, for example “I have a lot of difficulty with my health compared to my brother;” or relative to caregiver’s own history, for example “I have more difficulty with my health this month compared to last month;” or the caregiver can evaluate their own health without any qualifications, for example “I have little difficulty with my health.”

Caregiver Health: How confident are you that you will have the ability to continue to provide care?

(answered by the primary caregiver and assessor)

Possible answers:

Very confident

Somewhat confident

Not very confident

Caregiver: The caregiver will answer from the perspective of his/her ability to keep providing the needed care (differentiated from the desire to do so).

Assessor: The assessor will also note his/her understanding of how likely it is that this caregiver will be able to continue to provide the needed care based on all of the information gathered during the assessment process.

Caregiver Health: Is the caregiver in crisis?

(answered by the assessor)

Possible answers:

Yes (Y)

No (N)

If yes, check all that apply:

Financial, Emotional, and Physical

Primary caregiver crisis describes a situation where the caregiver is present but does not appear to have the ability and/or willingness to continue to provide the care needed by the consumer. This may be due to physical or emotional limitations of the caregiver and/or the increasing demand for more help by the consumer. The crisis may already be in effect or may be quickly approaching.

Scenario:

Mr. D is 88 years old, has Parkinson's Disease, and is totally dependent on assistive devices and help from his 66-year-old daughter, Ms. E, to manage his ADLs. During an in-home visit, the case manager notices a limp in the caregiver's walk and a bruise on her leg. Ms. E reports that she was recently diagnosed with diabetes, her blood pressure is high, and she is having physical difficulty helping her father transfer from the bed to his wheelchair and wheelchair to the car. She states that she is afraid he needs more care than she can provide and as much as she hates the idea, she is considering the possibility of a nursing facility for her father.

Question:

Is the crisis related to the caregiver's or consumer's situation?

Answer:

The caregiver crisis can be directly related to the caregiver's own situation and/or the consumer's situation.

Consumer Conditions: How would you rate your overall health at **this** time?

Possible answers:

Excellent

Very good

Good

Fair

Poor

This question is meant to be a subjective reflection by the consumer about his/her overall opinion of his/her own health, and the assessor should not attempt to verify their opinion against other information. A consumer's perception of their health can boost or undermine their independence. This opinion can be relative to other people, for example “My health is good compared to my brother;” or relative to consumer’s own history, for example “My health is excellent this month compared to last month;” or the consumer can evaluate their own health without any qualifications, for example “My health is fair.”

Consumer Conditions: Compared to a year ago, how would you rate your health?

Possible answers:

Much Better

Better

About same

Worse

Much worse

This question is meant to direct the consumer to reflect on his/her own health and rate his/her progress or decline over the course of the last year.

Consumer Conditions: How often are there things you want to do but cannot because of physical problems?

Possible answers:

Never

Occasionally

Often

All the time

This question is meant to be a subjective reflection by the consumer about his/her overall goals for his/her life. As an example, Mr. P, a 79-year-old retiree who enjoys a sedentary lifestyle watching sports and news programs on the television went in for his regular doctor's appointment with no complaints. The doctor sent Mr. P for tests and found his arteries 90% blocked. The physician stated if the man had not been sedentary, he could have had a massive heart attack.

In this example, the consumer may have answered “never.”

Consumer Resources: When you need medical care, how often do you get it?

Possible answers:

Always

Most of the time

Rarely

Only in an emergency

Never

This item refers to (planned or scheduled non-emergency) treatment and care provided by doctors, nurses, and therapists at the hospital, clinic, office, or other location.

Scenario:

Mr. and Mrs. J are 82 and 79 years old respectively, both with chronic health conditions, including diabetes, high blood pressure, and heart disease. These health conditions require the couple to keep routine doctor appointments for regular medical tests and health screens. In the rural area in which they live, the nearest health clinic is 20 miles from their home. The health clinic **generally** provides outreach and medical screenings in surrounding areas and sends out visiting nurses **most of the time**.

Question:

Is medical care readily available to Mr. and Mrs. J?

Answer:

In this scenario, the answer is “**most of the time**.” Routine (planned or scheduled non-emergency) medical care is available to Mr. and Mrs. J in a limited capacity.

When you need transportation to medical care, how often do you get it?

Possible answers:

Always

Most of the time

Rarely

Only in an emergency

Never

This is meant to include any means of transportation that the consumer is able to arrange on their own. This does not include calling 911.

Scenario:

Ms. E, age 91, lives alone in a rural town. She does not drive and her only relative lives out of state. She was recently diagnosed with hypertension and is feeling ill. She needs to have her blood pressure checked and her high blood pressure prescription renewed by the doctor. It is 11:00 a.m. on Thursday and the doctor has agreed to see her at 11:30 a.m. as the office closes at noon. Her neighbor works during the day, and there is no taxi service available where she lives. Ms. E is afraid of hospitals and will only see her primary doctor. Without ample notice, it is difficult for Ms. E to obtain transportation to see the doctor.

Question:

Is transportation to medical care readily available to Ms. E?

Answer:

In this scenario, the consumer may indicate that transportation to medical care is rarely available. She cannot get to her doctor's office without assistance from someone to drive her and her options are limited.

How often do finances/insurance allow you to obtain healthcare and medications when you need them?

Possible answers:

Always

Most of the time

Rarely

Only in an emergency

Never

This refers to the consumer's overall ability to afford treatment that can be achieved in combination with insurance and other means.

Activities of Daily Living (ADLs)

This section helps to identify the consumer's ability to function in daily life.

Activities of Daily Living deal with self-care issues.

The objective is to determine the amount of assistance the consumer generally needs to function as normally and independently as possible.

If a consumer is receiving assistance because they live in a facility, like an ALF or nursing facility, score the level of assistance they receive by task on an individual basis.

How much **assistance** do you need with the following **tasks**?

- Bathing
- Dressing
- Eating
- Using Bathroom
- Transferring
- Walking/Mobility

Bathing

No assistance needed - Consumer is able to:

- Run the water
- Take the bath or shower
- Wash all parts of the body, including hair without help from another person

Uses assistive device - Consumer is able to perform all parts of the bathing activity because of the use of assistive device(s).

Needs supervision or prompt - Consumer is able to perform all parts of the bathing activity if another person is there during the activity to:

- Lend support by their presence; or
- Coach the consumer through the activity
- **Example 1:** Another person is needed because the consumer is afraid of falling.
- **Example 2:** Another person is needed to remind the consumer to complete all parts of the activity.

Note: No hands-on assistance is given.

Bathing

Needs assistance (but not total help) –

- Consumer is able to perform some parts of the bathing activity.
- Another person is needed during the activity to lend some hands-on assistance.
- **Example 1:** Another person needs to wash the consumer's hair or back.
- **Example 2:** Consumer needs another person to help them into the tub and hand them the hand-held sprayer.

Needs total assistance (cannot do at all) –

- Consumer is unable to perform the bathing activity.
- Another person is needed to bathe the consumer.
- **Example 1:** Consumer must be physically led through every part of the activity due to dementia.
- **Example 2:** Consumer is bed bound and physically unable to bathe himself/herself.

Sample Assistive Devices for Bathing

- Grab bars
- Hand-held shower head
- Bath seat with arm rails
- Non-slip floor mat
- Transfer bath bench
- Tap turners
- Bath mitts
- Long-handled brushes or sponges
- No rinse shampoo/body wash

Dressing

No assistance needed - Consumer is able to:

- Put clothes on
- Fasten clothes
- Put shoes on
- Get clothing and shoes unfastened and off

Uses assistive devices - Consumer is able to perform all parts of the dressing activity because of the use of assistive device(s).

Needs supervision or prompt - Consumer is able to perform all parts of the dressing activity if another person is there during the activity to:

- Lend support by their presence; or
- Coach the consumer through the activity
- **Example:** Another person is needed to remind the consumer to dress completely and appropriately.

Note: No hands-on assistance is given.

Dressing

Needs assistance (but not total help) –

- Consumer is able to perform some parts of the dressing activity.
- Another person is needed during the activity to lend some hands-on assistance.
- **Example:** Another person is needed to zip up the back of a dress or help the consumer put on socks and shoes.

Needs total assistance (cannot do at all) –

- Consumer is unable to perform the dressing activity.
- Another person is needed to perform the activity for the consumer.
- **Example 1:** Consumer sits or stands while someone dresses him/her.
- **Example 2:** Consumer is bed bound and physically unable to dress himself/herself.

Sample Assistive Devices for Dressing

- Long-handled shoe-horn
- Velcro fastenings
- Sock pullers
- Rubber gloves (for gripping tight-fitting stockings)
- Long-handled reachers
- Button hook
- Dressing stick
- Zipper pulls
- Elastic shoelaces

Eating

No assistance needed - Consumer is able to:

- Eat food
- Drink from a cup
- Cut food

Uses assistive device - Consumer is able to perform all parts of the eating activity because of the use of assistive device(s).

Needs supervision or prompt - Consumer is able to perform all parts of the eating activity if another person is there during the activity to:

- Lend support by their presence; or
- Coach the consumer through the activity
- **Example:** Another person is needed to sit and encourage the consumer to eat what has been prepared for him/her.

Note: No hands-on assistance is given.

Eating

Needs assistance (but not total help) –

- Consumer is able to perform some parts of the eating activity.
- Another person is needed during the activity to lend some hands-on assistance.
- **Example 1:** Another person is needed to cut the meal into small pieces.
- **Example 2:** Consumer needs for another person to be present to clean up spills while the consumer feeds himself/herself.

Needs total assistance (cannot do at all) –

- Consumer is unable to perform the eating activity.
- Another person is needed to feed the consumer.
- **Example:** Consumer has to be fed by another person.

Sample Assistive Devices for Eating

- Adapted cutlery
- Adhesive placemats
- Plate guard
- Attachable glass handle
- Bendable straw
- Straw-holder
- Plates with suction on bottom

Using Bathroom

No assistance needed - Consumer is able to:

- Get to the toilet
- Get on and off the toilet
- Adjust clothing
- Clean himself/herself if accidents occur

Uses assistive device - Consumer is able to perform all parts of the toileting activity because of the use of assistive device(s).

Needs supervision or prompt - Consumer is able to perform all parts of the toileting activity if another person is there during the activity to:

- Lend support by their presence; or
- Coach the consumer through the activity
- **Example 1:** Another person is needed because the consumer is unsure of himself/herself.
- **Example 2:** Consumer needs reminders of when they need to use the toilet.

Note: No hands-on assistance is given.

Using Bathroom

Needs assistance (but not total help) –

- Consumer is able to perform some parts of the toileting activity.
- Another person is needed during the activity to lend some hands-on assistance.
- **Example 1:** Another person is needed to empty bedside commode for the consumer.
- **Example 2:** Consumer needs help on and off the toilet.

Needs total assistance (cannot do at all) –

- Consumer is unable to perform the toileting activity.
- **Example:** Consumer is incontinent and another person must change his/her diaper.

Sample Assistive Devices for Using Bathroom

- Urinals
- Night light
- Bed pans
- Bedside commode
- Fixed grab bars
- Fixed toilet frame
- Raised toilet seat
- Long handled toilet tissue/wipes device
- Portable bidet-toilets
- Diapers

Transferring

No assistance needed - Consumer is able to:

- Get in and out of bed or chair

Uses assistive device - Consumer is able to perform all parts of the transferring activity because of the use of assistive device(s).

Needs supervision or prompt - Consumer is able to perform all parts of the transferring activity if another person is there during the activity to:

- Lend support by their presence; or
- Coach the consumer through the activity
- **Example:** Consumer wants someone to be present as he/she gets in and out of bed.

Note: No hands-on assistance is given

Transferring

Needs assistance (but not total help) –

- Consumer is able to perform some parts of the transferring activity.
- Another person is needed during the activity to lend some hands-on assistance.
- **Example 1:** Another person is needed to support the elbow of the consumer as the/she makes a transfer.
- **Example 2:** Another person is needed to place the assistive device directly in front of the consumer and provide support to help the consumer to a standing or sitting position.

Needs total assistance (cannot do at all) –

- Consumer is unable to perform the transferring activity.
- Another person is needed to perform the activity for the consumer.
- **Example:** Consumer is unable to move on his/her own and is therefore unable to transfer without another person picking him/her up or operating a lift.

Sample Assistive Devices for Transferring

- Transfer board
- Transfer chair
- Walker
- Cane
- Portable seat lift
- Chair lift
- Slip-resistant flooring

Walking/Mobility

No assistance needed - Consumer is able to:

- Walk around/be mobile for short distances at home
- This does not include climbing the stairs

Uses assistive device - Consumer is able to perform all parts of the walking/mobility activity because of the use of assistive device(s).

Needs supervision or prompt - Consumer is able to perform all parts of the walking/mobility activity if another person is there during the activity to:

- Lend support by their presence; or
- Coach the consumer through the activity
- **Example:** A consumer who is able to walk using a cane or walker but is afraid of falling and needs another person present.

Note: No hands-on assistance is given.

Walking/Mobility

Needs assistance (but not total help) –

- Consumer is able to perform some parts of the walking/mobility activity.
- Another person is needed during the activity to lend some hands-on assistance.
- **Example 1:** Another person is needed to support the elbow of the consumer as he/she move between rooms.
- **Example 2:** Consumer can sometimes use a walker with someone walking beside him/her and sometimes must be pushed in a wheelchair due to the consumer's physical condition.

Needs total assistance (cannot do at all) –

- Consumer is unable to perform the walking/mobility activity.
- Another person is needed for the activity to be performed.
- **Example:** Consumer is unable to walk/be mobile and must be pushed in a wheelchair by another person.

Sample Assistive Devices for Walking/Mobility

- Cane
- Walker
- Rolling walker
- Quad walker
- Wheelchair
- Wheelchair gel/foam pads (pressure relief)
- Doorway threshold ramps
- Doorway hinge extenders
- Slip-resistant flooring
- Leg lifter

How much assistance do you have with the following tasks?

Always has assistance - The consumer has help from another person/other persons when he/she needs it.

Has assistance most of the time - The consumer has a person or persons to help, but they are not always available when needed or are unable to supply all of the help needed at any time.

Rarely has assistance - The consumer has a person or persons to help a little but not regularly and not enough.

Never has assistance - The consumer has need of help, but there is no one to supply the help needed.

No assistance needed - Either the consumer is able to perform an activity without any human assistance or the consumer is able to perform an activity through the use of an assistive device.

Instrumental Activities of Daily Living (IADLs)

This section helps to identify the consumer's ability to function in daily life.

Instrumental Activities of Daily Living deal with the consumer in relation to the general community.

The objective is to determine the amount of assistance the consumer generally needs to function as normally and independently as possible.

If a consumer is receiving assistance because they live in a facility, like an ALF or nursing facility, score the level of assistance they receive by task on an individual basis.

How much assistance do you need with the following tasks?

- Heavy Chores
- Light Housekeeping
- Using the Telephone
- Managing Money
- Preparing Meals
- Shopping
- Managing Medication
- Using Transportation

Doing Heavy Chores

No assistance needed - Consumer is able to:

- Do heavy cleaning
- Yard work
- Wash windows
- Move furniture
- Laundry

Uses assistive device - Consumer is able to perform all parts of the heavy chores activity because of the use of assistive device(s).

Needs supervision or prompt - Consumer is able to perform all parts of the heavy chores activity if another person is there during the activity to:

- Lend support by their presence; or
- Coach the consumer through the activity
- **Example:** Consumer is physically able to perform the activity but must be reminded to start the activity and/or continue until all parts of the activity are completed.

Doing Heavy Chores

Needs assistance (but not total help) –

- Consumer is able to perform some parts of the heavy chores activity.
- Another person is needed during the activity to lend some hands-on assistance.
- **Example 1:** Another person is needed to prepare the equipment or materials to be used and put them away afterwards.

Example 2: Consumer needs help with yard work.

Needs total assistance (cannot do at all) –

- Consumer is unable to perform the heavy chores activity
- Another person is needed to perform the activity for them
- **Example:** Consumer is unable to lift their arms, bend, or carry any heavy objects and must have all heavy chores performed for him/her.

Sample Assistive Devices for Doing Heavy Chores

- Reaching tools
- Adaptable walker baskets
- Wheelchair trays
- Container openers
- Turning handle devices
- See through work trays
- Wheelchair multi-pocketed bags

Doing Light Housekeeping

No assistance needed - Consumer is able to:

- Dust
- Vacuum
- Sweep

Uses assistive device - Consumer is able to perform all parts of the light housekeeping activity because of the use of assistive device(s).

Needs supervision or prompt - Consumer is able to perform all parts of the light housekeeping activity if another person is there during the activity to:

- Lend support by their presence; or
- Coach the consumer through the activity
- **Example 1:** Consumer is physically able to perform the activity but needs to be reminded to do the activity or coached through it.
- **Example 2:** Consumer can perform the activity but is unsteady and needs another person present to feel safe during the performance of the activity.

Doing Light Housekeeping

Needs assistance (but not total help) –

- Consumer is able to perform some parts of the light housekeeping activity.
- Another person is needed during the activity to lend some hands-on assistance.
- **Example 1:** Consumer needs another person to perform the reaching or bending tasks.
- **Example 2:** Consumer is able to dust but unable to sweep or vacuum.

Needs total assistance (cannot do at all) –

- Consumer is unable to perform the light housekeeping activity.
- Another person is needed to perform the activity for the consumer.
- **Example:** Consumer is unable to reach, bend, or carry and can not perform any part of the light housekeeping activity.

Sample Assistive Devices for Doing Light Housekeeping

- Long-handled reacher/duster/scrubber
- Rolling laundry/shopping cart
- Wheelchair tray
- Adapted walker basket
- Doorway threshold ramps
- Non-slip dish holders
- Glass washer with suction base
- Padded spring loaded scissors for opening packages

Using Telephone

No assistance needed - Consumer is able to:

- Answer the telephone
- Make a telephone call
- This includes speed dial

Uses assistive device - Consumer is able to perform all parts of the use of phone activity because of the use of assistive device(s).

Needs supervision or prompt - Consumer is able to perform all parts of the use of phone activity if another person is there during the activity to:

- Lend support by their presence; or
- Coach the consumer through the activity
- **Example:** Consumer is able to use the phone but not able to understand what the caller is requesting.

Using Telephone

Needs assistance (but not total help) –

- Consumer is able to perform some parts of the use of phone activity.
- Another person is needed during the activity to lend some hands-on assistance.
- **Example:** The consumer is able to answer the phone but unable to make calls.

Needs total assistance (cannot do at all) –

- Consumer is unable to perform the use of phone activity.
- Another person is needed to perform the activity for the consumer.
- **Example:** Consumer can no longer reach for the phone, dial any numbers ,or pick up the phone to speak due to dementia or physical conditions.

Sample Assistive Devices for Using Phone

- Loud ringtone
- Flashing or strobe light ring indicator
- Large numbers and buttons
- Automatic dialing
- Special amplifier

Managing Money

No assistance needed - Consumer is able to:

- Pay own bills
- Balance checkbook

Uses assistive device - Consumer is able to manage money because of the use of assistive device(s).

Needs supervision or prompt - Consumer is able to manage money because another person is there during the activity to:

- Lend support by their presence; or
- Coach the consumer through the activity
- **Example:** Consumer is able to pay their own bills, but they must be reminded to do so.

Managing Money

Needs assistance (but not total help) –

- Consumer is able to perform some parts of the managing money activity.
- Another person is needed during the activity to lend some hands-on assistance.
- **Example 1:** Another person is needed to balance the checkbook.
- **Example 2:** Another person is needed to gather all the bills for the consumer and help balance the checkbook after all bills have been paid by the consumer.

Needs total assistance (cannot do at all) –

- Consumer is unable to manage money.
- Another person is needed to perform the activities for the consumer.
- **Example:** Consumer is no longer able to keep track of bills, pay the bills, or balance the checkbook.

Sample Assistive Devices for Managing Money

- Online banking
- Reminder system
- Calendar
- Automatic deposits
- Adaptable writing instruments
- Computers or touch screen computers
- Touch screen computer software
- Lighted magnifying devices

Preparing Meals

No assistance needed - Consumer is able to prepare meals for himself/herself including sandwiches, cooked meals, and heat pre-prepared meals.

Uses assistive device - Consumer is able to perform all parts of the preparing meals activity because of the use of assistive device(s).

Needs supervision or prompt - Consumer is able to perform all parts of the preparing meals activity if another person is there during the activity to:

- Lend support by their presence; or
- Coach the consumer through the activity
- **Example 1:** Consumer is able to prepare a meal but needs to be reminded that it is time to begin the preparation.

Preparing Meals

Needs assistance (but not total help) –

- Consumer is able to perform some parts of the preparing meals activity.
- Another person is needed during the activity to lend some hands-on assistance.
- **Example 1:** Another person is needed to get the ingredients assembled for the consumer to use.
- **Example 2:** Consumer can prepare some meals like sandwiches or cereal but cannot prepare hot meals.

Needs total assistance (cannot do at all) –

- Consumer is unable to perform the preparing meals activity.
- Another person is needed to perform the activity for the consumer.
- **Example 1:** Consumer can no longer stand long enough to fix a meal due to physical conditions.
- **Example 2:** Consumer is suffering from dementia and can no longer fix a meal.

Sample Assistive Devices for Preparing Meals

- Easy-grip utensils
- Side-opening oven door
- Height-adjustable cupboards and counters
- Automatic-stop kettle
- Pouring aid
- Perching stool with back support
- Wall-mounted can opener
- Kitchen trolley
- Burners with a lip
- Clock timers
- Microwave

Doing Shopping

No assistance needed - Consumer is able to shop for food and other needed items (not including transportation to the store).

Uses assistive device - Consumer is able to perform all parts of the shopping activity because of the use of assistive device(s).

Needs supervision or prompt - Consumer is able to perform all parts of the shopping activity if another person is there during the activity to:

- Lend support by their presence; or
- Coach the consumer through the activity
- **Example:** Consumer needs to be accompanied by another person to ensure the consumer purchases appropriate foods and complete the activity.

Doing Shopping

Needs assistance (but not total help) –

- Consumer is able to perform some parts of the shopping activity.
- Another person is needed during the activity to lend some hands-on assistance.
- **Example 1:** Another person is needed to reach items on the high and low shelves.
- **Example 2:** Consumer needs another person to go to the store with them and put items in the cart.

Needs total assistance (cannot do at all) –

- Consumer is unable to perform the shopping activity.
- Another person is needed to perform the activity for them.
- **Example:** Consumer is no longer able to participate in the shopping activity, and another person is needed to complete the entire activity for the consumer.

Sample Assistive Devices for Doing Shopping

- Motorized wheelchair
- Motorized shopping cart
- Long-handled reachers
- Adaptable walker baskets
- Wheelchair tray
- Rolling shopping carts

Managing Medication

No assistance needed - Consumer is able to take medications as prescribed by the doctor or as instructed on an over-the-counter package.

Uses assistive device - Consumer is able to perform all parts of the taking medication activity because of the use of assistive device(s).

Needs supervision or prompt - Consumer is able to perform all parts of the taking medication activity if another person is there during the activity to:

- Lend support by their presence; or
- Coach the consumer through the activity

Managing Medication

Needs assistance (but not total help) –

- Consumer is able to perform some parts of the taking medication activity.
- Another person is needed during the activity to lend some hands-on assistance.
- **Example 1:** Another person is needed to fill the pill minder for the consumer.
- **Example 2:** Consumer needs another person to hand them the pills.

Needs total help (cannot do at all) – Consumer is unable to perform the taking medication activity.

- **Example:** Consumer must rely on someone to administer medications, including putting the pill in the consumer's mouth, holding the water and rubbing the consumer's throat to encourage swallowing.

Sample Assistive Devices for **Managing** Medication

- Pill minder
- Pill cutter
- Magnifying device to read labels
- Pill packaging that is dose, day, and time specific
- Calendar/clock reminder alarms

Using Transportation

No assistance needed - Consumer is able to:

- Drive a vehicle, or
- Use local transportation

Uses assistive device - Consumer is able to perform all parts of the transportation activity because of the use of assistive device(s).

Needs supervision or prompt - Consumer is able to perform all parts of the transportation activity if another person is there during the activity to:

- Lend support by their presence; or
- Coach the consumer through the activity
- **Example:** Consumer needs someone to ride along with him/her without giving any help besides their presence.

Using Transportation

Needs assistance (but not total help) –

- Consumer is able to perform some parts of the transportation activity.
- Another person is needed during the activity to lend some hands-on assistance.
- **Example 1:** Another person is needed to help the consumer in and out of the vehicle.
- **Example 2:** Consumer needs another person to drive him/her to and from a destination.

Needs total assistance (cannot do at all) –

- Consumer is unable to perform the transportation activity.
- Another person is needed to perform the activity for the consumer.
- **Example:** Consumer is no longer able to drive, arrange for needed transportation, or get in and out of a vehicle without complete help.

Sample Assistive Devices for Using Transportation

- Wheelchair
- Scooter
- Wheelchair ramps
- Adapted vehicles
- Steering wheel knobs
- Padded swivel car seats
- Car seat back supports
- Extra-large rearview mirrors
- Backup cameras
- Door or car key holders

How much assistance do you have with the following tasks?

Always has assistance - The consumer has help from another person(s) when he/she needs it.

Has assistance most of the time - The consumer has someone who helps but is not always available when needed or someone who is not able to supply all of the help needed at any time.

Rarely has assistance - The consumer has a person or persons to help a little but not regularly and not enough.

Never has assistance - The consumer has need of help, but there are no persons to supply the help needed.

No assistance needed- Either the consumer is able to perform an activity without any human or the consumer is able to perform an activity through the use of an assistive device.

A Word About Safe Assistive Devices

- An assistive device is designed to provide the assistance needed to help a person with an ADL or IADL deficit. Some consumers use ordinary objects as informal devices in lieu of appropriate devices.
- Example: A walker is an appropriate device for some people with mobility deficits. However, some consumers may use a desk chair with wheels. This does not appropriately replace a walker designed for the purpose of helping someone with mobility limitations.
- The reason an informal device cannot safely be used instead of a formal device is that the chair is not constructed or intended as a safe way to help someone walk around the house and, in fact, could increase the elder's risk of falling.

Scoring Informal Devices

- In this instance, the consumer should be encouraged to use an assistive device designed as an aid for mobility. Often, the primary care physicians can prescribe a formal assistive device.
- Informal devices, like chairs, are not scored as assistive devices under ADL/IADL need. Instead, the consumer need level would be “needs supervision or prompt” or “needs assistance (but not total help”, and in scoring resources, the assessor must note a need for a device and score the consumer that they “never” has assistance.



Thank you