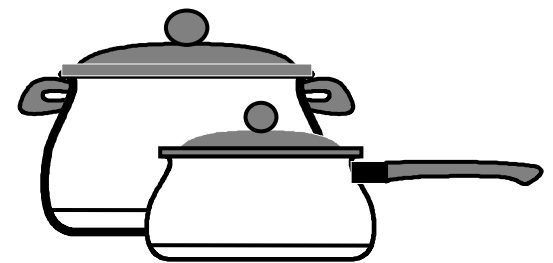


# Performance Assessment of Self-Care Skills (PASS – Clinic) Version 4.1

©Rogers, JC, Holm, MB, & Chisholm, D, all rights reserved, 2016





## CLIENT INFORMATION SHEET: PASS CLINIC (PASS – C)

CLIENT \_\_\_\_\_ Admission \_\_\_\_\_ Progress \_\_\_\_\_ Discharge \_\_\_\_\_

DATE: MONTH \_\_\_\_ / DAY \_\_\_\_ / YEAR \_\_\_\_

HOUR: \_\_\_\_ : \_\_\_\_ AM / PM



## Performance Assessment of Self-Care Skills, Version 4.1 – Clinic

### Table of Contents

<u>Page</u>	<u>Items Administered</u>	<u>Task</u>	<u>ADL/IADL</u>
4	_____	# H1	FM: Bed Mobility
6	_____	# H2	FM: Stair Use
8	_____	# H3	FM: Toilet Mobility and Management
10	_____	# H4	BADL: Oral Hygiene
12	_____	# H5	FM: Bathtub and Shower Mobility
14	_____	# H6	BADL: Trimming Toenails
16	_____	# H7	BADL: Dressing
18	_____	# H8	IADL-C: Shopping (Money Management)
20	_____	# H9	IADL-C: Bill Paying by Check (Money Management)
22	_____	# H10	IADL-C: Checkbook Balancing (Money Management)
24	_____	# H11	IADL-C: Mailing Bills (Money Management)
26	_____	# H12	IADL-P: Taking Out Garbage; Key Use (Heavy Housework)
28	_____	# H13	IADL-C: Telephone Use
30	_____	# H14	IADL-C: Medication Management
32	_____	# H15	IADL-P: Changing Bed Linens (Heavy Housework)
34	_____	# H16	IADL-C: Obtaining Critical Information from the Media (Auditory)
36	_____	# H17	IADL-C: Obtaining Critical Information from the Media (Visual)
38	_____	# H18	IADL-C: Flashlight Repair (Home Maintenance)
40	_____	# H19	IADL-P: Sweeping (Home Maintenance)
42	_____	# H20	FM: Indoor Walking
44	_____	# H21	IADL-C: Home Safety
46	_____	# H22	IADL-C: Playing Bingo
48	_____	# H23	IADL-C: Oven Use (Meal Preparation)
50	_____	# H24	IADL-C: Stovetop Use (Meal Preparation)
52	_____	# H25	IADL-C: Use of Sharp Utensils (Meal Preparation)
54	_____	# H26	IADL-P: Cleanup after Meal Preparation (Light Housework)

---

FM = Functional Mobility; BADL = Basic Activities of Daily Living; IADL-C = Instrumental ADL with cognitive emphasis; IADL-P = IADL with a physical emphasis

## Task # C1: FM: Bed Mobility

### CLINIC CONDITIONS: Bedroom area and

1. Bed, with pillow placed at the head of the bed and towel placed at the foot of the bed\*
2. Client, positioned in line with the foot of the bed, 2 feet out from the side, facing the bed

\*Ascertain the side of the bed (right or left) that the Client generally uses to get into bed. Use this side for testing and if necessary, position the pillow at the foot of the bed and the towel at the head of the bed.

### CLINIC INSTRUCTIONS:

"I need to have you show me how you get into bed, move in bed, and get out of bed. I have placed a towel on the end of the bed, so don't worry about your shoes."

(NOTE: If Client is wearing glasses, have the Client remove them and place them in a safe location)

"Now, please stand here." [Point, 2 feet out from the foot of the bed]

"Now, show me how you get into bed." [Wait for response]

"Now, turn . . .

[depending on how Client is positioned ask client to turn to the opposite side, e.g.,]:

\*\*\*from your back to your stomach."

\*\*\*from your stomach to your back."

\*\*\*from your right side to your left side."

\*\*\*from your left side to your right side."

"Now, show me how you get out of bed and stand up by the bed." [Wait for response]

SCORE	INDEPENDENCE	SAFETY	ADEQUACY	
			PROCESS	QUALITY
3	No assists given for task initiation, continuation, or completion	Safe practices were observed	Subtasks performed with precision & economy of effort & action	Optimal (performance matches the quality standards listed in each subtask)
2	No Level 7-9 assists given, but occasional Level 1-6 assists given	Minor risks were evident but no assistance provided	Subtasks generally performed w/ precision & economy of effort & action; occasional lack of efficiency, redundant or extraneous action; no missing steps	Acceptable (Performance, for the most part, matches or nearly matches the quality standards listed in each subtask)
1	No Level 9 assists given; or occasional Level 7 or 8 assists given; or continuous Level 1-6 assists given	Risks to safety were observed and assistance given to prevent potential harm	Subtasks generally performed w/ lack of precision and/or economy of effort & action; consistent extraneous or redundant actions; steps may be missing	Marginal (Performance, for the most part, does not match the quality standards listed in each subtask)
0	Level 9 assists given; or continuous Level 7 or 8 assists given; or unable to initiate, continue, or complete subtask or task	Risks to safety of such severity were observed that task was stopped or taken over by assessor to prevent harm	Subtasks are consistently performed w/ lack of precision and/or economy of effort & action so that task progress is unattainable	Unacceptable (Performance does not match the quality standards listed in each subtask, perhaps with few exceptions)

Task # C1: FM: Bed Mobility		INDEPENDENCE DATA										SAFETY DATA	ADEQUACY DATA		SUMMARY SCORES	
Assistive Technology Devices (ATDs) used during task: 1. 2. 3. Total # of ATDs used: _____		No Assistance	Verbal Supportive (Encouragement)	Verbal Non-Directive	Verbal Directive	Gestures	Task or Environment Rearrangement	Demonstration	Physical Guidance	Physical Support	Total Assist	INDEPENDENCE subtask scores	Unsafe Observations	PROCESS: Imprecision, lack of economy, missing steps		QUALITY: Standards not met / improvement needed
Assist level →		0	1	2	3	4	5	6	7	8	9					
Subtasks	Subtask Criteria															
1	<u>Lowers self onto bed</u> in a <u>controlled</u> manner (does not “plop” down)															
2	<u>Adjusts body position</u> so mattress <u>completely</u> supports total body (prone, supine, sidelying)															
3	<u>Turns self around 180 degrees</u> in a <u>controlled</u> manner (smooth movement, no false starts)															
4	<u>Raises self to sitting position</u> on edge of bed in a <u>controlled</u> manner (does not “ratchet” self upright)															
5	<u>Raises self off bed</u> in a <u>controlled</u> manner (does not “rock” to gain momentum)															
6	<u>Comes to stand &amp; achieves &amp; maintains balance</u> (does not pull self up, does not hold onto bed or other objects)															

INDEPENDENCE  
MEAN SCORE

SAFETY  
SCORE

ADEQUACY  
SCORE

## Task # C2: FM: Stair Use

### CLINIC CONDITIONS:

1. Flight of stairs
2. Client, with shoes on, positioned at the bottom of the stairs

### CLINIC INSTRUCTIONS:

"Show me how you walk up and down stairs by going up and down the entire staircase. Do you know what you are to do?" [Wait for response]

SCORE	INDEPENDENCE	SAFETY	ADEQUACY	
			PROCESS	QUALITY
3	No assists given for task initiation, continuation, or completion	Safe practices were observed	Subtasks performed with precision & economy of effort & action	Optimal (performance matches the quality standards listed in each subtask)
2	No Level 7-9 assists given, but occasional Level 1-6 assists given	Minor risks were evident but no assistance provided	Subtasks generally performed w/ precision & economy of effort & action; occasional lack of efficiency, redundant or extraneous action; no missing steps	Acceptable (Performance, for the most part, matches or nearly matches the quality standards listed in each subtask)
1	No Level 9 assists given; or occasional Level 7 or 8 assists given; or continuous Level 1-6 assists given	Risks to safety were observed and assistance given to prevent potential harm	Subtasks generally performed w/ lack of precision and/or economy of effort & action; consistent extraneous or redundant actions; steps may be missing	Marginal (Performance, for the most part, does not match the quality standards listed in each subtask)
0	Level 9 assists given; or continuous Level 7 or 8 assists given; or unable to initiate, continue, or complete subtask or task	Risks to safety of such severity were observed that task was stopped or taken over by assessor to prevent harm	Subtasks are consistently performed w/ lack of precision and/or economy of effort & action so that task progress is unattainable	Unacceptable (Performance does not match the quality standards listed in each subtask, perhaps with few exceptions)



Task # C2: FM: Stair Use		INDEPENDENCE DATA											SAFETY DATA	ADEQUACY DATA	
Assistive Technology Devices (ATDs) used during task: 1. 2. 3. Total # of ATDs used: _____		No Assistance	Verbal Supportive (Encouragement)	Verbal Non-Directive	Verbal Directive	Gestures	Task or Environment Rearrangement	Demonstration	Physical Guidance	Physical Support	Total Assist	INDEPENDENCE subtask scores	Unsafe Observations	PROCESS: Imprecision, lack of economy, missing steps	QUALITY: Standards not met / improvement needed
Assist level →		0	1	2	3	4	5	6	7	8	9				
Subtasks	Subtask Criteria														
1	<u>Ascends stairs</u> with <u>reciprocal</u> gait & <u>maintains</u> balance (does not place 2 feet on a step, does not use nearby wall for support or "pull" self up on the railing)														
2	<u>Positions self on upper landing appropriately</u> (about 6" in from edge of the landing) & <u>maintains</u> balance (does not lean against wall for support, or "catch" self against the wall)														
3	<u>Descends stairs</u> with <u>reciprocal</u> gait & <u>maintains</u> balance (does not place 2 feet on a step, does not use nearby wall for support or "lower" self down steps by bearing full weight on the railing)														

SUMMARY SCORES	
INDEPENDENCE MEAN SCORE	<input type="text"/>
SAFETY SCORE	<input type="text"/>
ADEQUACY SCORE	<input type="text"/>

### Task # C3: FM: Toilet Mobility and Management

#### CLINIC CONDITIONS: Bathroom area and

1. Toilet, "as is" (may have safety rails)
2. Elastic-waist shorts (extra-large size) available if needed
3. Client positioned facing the toilet

#### CLINIC INSTRUCTIONS:

"Now let's go into the bathroom to assess morning care activities." [Wait for client to locate bathroom]

[As client enters the bathroom] "For this task you do not need to remove your clothing, however, if you do not wish to lower your pants/slacks here is a pair of shorts you can put over your pants/slacks before you begin. Do you know what you are to do?" [Wait for response]

"First I'd like you to show me how you manage clothing as you prepare to sit down on the toilet." [Wait for response]

"Now show me how you sit down on the toilet and how you reach for and gather toilet paper. Put the toilet paper into the toilet as you normally would. Do you know what you are to do?" [Wait for response]

"Now show me how you get up from the toilet and pull up your clothing." [Wait for response]

SCORE	INDEPENDENCE	SAFETY	ADEQUACY	
			PROCESS	QUALITY
3	No assists given for task initiation, continuation, or completion	Safe practices were observed	Subtasks performed with precision & economy of effort & action	Optimal (performance matches the quality standards listed in each subtask)
2	No Level 7-9 assists given, but occasional Level 1-6 assists given	Minor risks were evident but no assistance provided	Subtasks generally performed w/ precision & economy of effort & action; occasional lack of efficiency, redundant or extraneous action; no missing steps	Acceptable (Performance, for the most part, matches or nearly matches the quality standards listed in each subtask)
1	No Level 9 assists given; or occasional Level 7 or 8 assists given; or continuous Level 1-6 assists given	Risks to safety were observed and assistance given to prevent potential harm	Subtasks generally performed w/ lack of precision and/or economy of effort & action; consistent extraneous or redundant actions; steps may be missing	Marginal (Performance, for the most part, does not match the quality standards listed in each subtask)
0	Level 9 assists given; or continuous Level 7 or 8 assists given; or unable to initiate, continue, or complete subtask or task	Risks to safety of such severity were observed that task was stopped or taken over by assessor to prevent harm	Subtasks are consistently performed w/ lack of precision and/or economy of effort & action so that task progress is unattainable	Unacceptable (Performance does not match the quality standards listed in each subtask, perhaps with few exceptions)

Task # C3: FM: Toilet Mobility and Management		INDEPENDENCE DATA											SAFETY DATA	ADEQUACY DATA	
Assistive Technology Devices (ATDs) used during task: 1. 2. 3. Total # of ATDs used: _____		No Assistance	Verbal Supportive (Encouragement)	Verbal Non-Directive	Verbal Directive	Gestures	Task or Environment Rearrangement	Demonstration	Physical Guidance	Physical Support	Total Assist	INDEPENDENCE subtask scores	Unsafe Observations	PROCESS: Imprecision, lack of economy, missing steps	QUALITY: Standards not met / improvement needed
Assist level →		0	1	2	3	4	5	6	7	8	9				
Subtasks	Subtask Criteria														
1	<u>Locates bathroom efficiently</u> (goes directly to bathroom)														
2	<u>Turns to position self</u> in front of toilet & <u>maintains balance</u> (does not grab sink for support; does not grab towel rack for support)														
3	<u>Manages clothing sufficiently</u> (so it does not get soiled), and <u>maintains balance appropriately</u> (does not lose balance/fall forward/drop to toilet seat)														
4	<u>Lowers self onto toilet</u> in a <u>controlled</u> manner (does not “plop” down; buttocks are centered on & touching seat)														
5	<u>Reaches for &amp; gathers</u> (grasps and folds) <u>toilet paper</u> , & <u>maintains balance</u> (does not fall forward or sideways)														
6	<u>Places toilet paper into toilet</u> & <u>maintains balance</u> (does not fall forward or sideways)														
7	<u>Raises self from toilet</u> in a <u>controlled</u> manner (does not “rock” to gain momentum; no loss of balance) & <u>achieves &amp; maintains</u> standing balance (does not sway or “catch” self on sink or other object)														
8	<u>Manages clothing sufficiently</u> (fits as it should at waist), and <u>maintains balance appropriately</u> (does not lose balance/fall forward/drop to toilet seat)														

SUMMARY SCORES	
<div style="border: 1px solid black; width: 50px; height: 40px; margin: 0 auto;"></div> INDEPENDENCE MEAN SCORE	<div style="border: 1px solid black; width: 50px; height: 40px; margin: 0 auto;"></div> SAFETY SCORE
<div style="border: 1px solid black; width: 50px; height: 40px; margin: 0 auto;"></div> ADEQUACY SCORE	

# **Task # C4: BADL: Oral Hygiene (Teeth only, Dentures Only, Dentures & Teeth, No Teeth or Dentures)**

## **CLINIC CONDITIONS:** Bathroom area and

1. Sink with running water, towel, and task materials for:
  - (a) Brushing teeth – toothpaste, toothbrush in cellophane wrap\*, paper cup
  - (b) Cleaning dentures\*\* - denture cleaner, denture cup, toothbrush in cellophane wrap\*, paper cup
  - (c) Brushing teeth & cleaning dentures\*\* - toothpaste, toothbrush in cellophane wrap\*, denture cleaner, denture cup, paper up
  - (d) Cleaning gums clean washcloth or swabs

\*Open the cellophane wrap at the handle end, but leave the cellophane wrap on to assure the Client that the toothbrush is new

\*\*Keep denture fixative available to squeeze onto a paper towel if Client needs it to secure dentures again

2. Client positioned in front of bathroom sink

## **CLINIC INSTRUCTIONS:**

"I am going to have you show me how you do your oral hygiene. Do you have your own teeth or dentures? [If dentures, "Do you have both lower and upper dentures?"]

## **CLINIC SPECIFIC INSTRUCTIONS:**

Teeth Only. "Show me how you care for your teeth. [Point] Here are some supplies. Do you know what you are to do? Do you have everything that you need?" [Wait for response]

Dentures Only. "Show me how you care for your dentures. [Point] Here are some supplies. If you soak your dentures, just let them soak for a few minutes. If you use a denture cream, please use the toothpaste instead. Do you know what you are to do? Do you have everything that you need?" [Wait for response]

Dentures and Teeth. "Show me how you care for your teeth and dentures. [Point] Here are some supplies. If you soak your dentures, just let them soak for a few minutes. If you use a denture cream, please use the toothpaste instead. Do you know what you are to do? Do you have everything that you need?" [Wait for response]

No teeth and no dentures. "Show me how you usually care for your mouth. [Point] Here are some supplies. Do you know what you are to do? Do you have everything that you need?" [Wait for response]

SCORE	INDEPENDENCE	SAFETY	ADEQUACY	
			PROCESS	QUALITY
3	No assists given for task initiation, continuation, or completion	Safe practices were observed	Subtasks performed with precision & economy of effort & action	Optimal (performance matches the quality standards listed in each subtask)
2	No Level 7-9 assists given, but occasional Level 1-6 assists given	Minor risks were evident but no assistance provided	Subtasks generally performed w/ precision & economy of effort & action; occasional lack of efficiency, redundant or extraneous action; no missing steps	Acceptable (Performance, for the most part, matches or nearly matches the quality standards listed in each subtask)
1	No Level 9 assists given; or occasional Level 7 or 8 assists given; or continuous Level 1-6 assists given	Risks to safety were observed and assistance given to prevent potential harm	Subtasks generally performed w/ lack of precision and/or economy of effort & action; consistent extraneous or redundant actions; steps may be missing	Marginal (Performance, for the most part, does not match the quality standards listed in each subtask)
0	Level 9 assists given; or continuous Level 7 or 8 assists given; or unable to initiate, continue, or complete subtask or task	Risks to safety of such severity were observed that task was stopped or taken over by assessor to prevent harm	Subtasks are consistently performed w/ lack of precision and/or economy of effort & action so that task progress is unattainable	Unacceptable (Performance does not match the quality standards listed in each subtask, perhaps with few exceptions)

Task # C4: BADL: Oral Hygiene		INDEPENDENCE DATA											SAFETY DATA	ADEQUACY DATA	
Assistive Technology Devices (ATDs) used during task: 1. 2. 3. Total # of ATDs used: _____		No Assistance	Verbal Supportive (Encouragement)	Verbal Non-Directive	Verbal Directive	Gestures	Task or Environment Rearrangement	Demonstration	Physical Guidance	Physical Support	Total Assist	INDEPENDENCE subtask scores	Unsafe Observations	PROCESS: Imprecision, lack of economy, missing steps	QUALITY: Standards not met / improvement needed
Assist level →		0	1	2	3	4	5	6	7	8	9				
Subtasks	Subtask Criteria														
1 Water	<u>Adjusts water adequately</u> (temperature lukewarm; does not pull hands away & pressure not forceful – water does not splash on sink, wall or floor)														
2 Teeth	<u>Manipulates toothpaste container</u> to obtain <u>adequate paste on brush</u> (paste can be visually observed on brush)														
3 Teeth	<u>Brushes all</u> parts of mouth where <u>teeth</u> are present <u>thoroughly</u> (no particles visible)														
4 Teeth	<u>Rinses mouth</u> of residue <u>and spits</u> into <u>appropriate</u> container (does not swallow residue; spits into sink/cup/toilet, not wastebasket)														
5 Dent	<u>Manages</u> all aspects of <u>solution preparation adequately</u> (opens container, gets enough water, no to minimal spillage)														
6 Dent	<u>Removes all dentures</u> from mouth (no dentures or partials are visible in the mouth)														
7 Dent	<u>Places dentures in solution</u> in a <u>controlled</u> manner (no risk of dropping, minimal spillage) with adequate solution coverage (no part of denture uncovered)														
8 Dent	<u>Brushes and rinses all</u> parts of <u>dentures thoroughly</u> (no particles visible)														
9 Dent	<u>Inserts all dentures into mouth correctly</u> ( top denture on top, etc.) & <u>securely</u> (fastened as designed)														
10 Dent	<u>Guards against damaging dentures adequately</u> (holds or places securely so that they do not fall during brushing or rinsing)														
11 Gums	<u>Cleans gums thoroughly</u> (swabs/brushes area of mouth without teeth)														
12 T&D&G	<u>Rinses brush thoroughly</u> (removes paste, particles)														
13 Water	<u>Turns off water faucet completely</u> (water does not run in steady stream)														

**SUMMARY SCORES**

INDEPENDENCE  
MEAN SCORE

SAFETY  
SCORE

ADEQUACY  
SCORE

## Task # C5: FM: Bathtub and Shower Mobility

CLINIC CONDITIONS: Bathroom area\* and

1. Shower in bathtub with safety rails around bathtub and the safety bar on the side of tub; safety mat or safety strips on bathtub/shower bottom
2. Client, with shoes and hosiery removed, positioned outside the bathtub near the center of the bathtub/shower facing the drain

**\*Caution – wipe bathtub/shower floor dry**

### CLINIC INSTRUCTIONS:

“Next I need you to take off your shoes and socks so you won’t slip when you get into the tub/shower [Scored under Task # C7 – Dressing]. “Now, I want you to show me how you get into the bathtub/shower to use the shower. Turn around like you would to rinse the front and back of your body and then get out of the tub/shower. Do you know what you are to do?” [Wait for response]

“Next, show me how you get into the bathtub to take a bath. Get into the bathtub, sit down in the tub, and then get out of the tub. Do you know what you are to do?” [Wait for response]

SCORE	INDEPENDENCE	SAFETY	ADEQUACY	
			<u>PROCESS</u>	<u>QUALITY</u>
3	No assists given for task initiation, continuation, or completion	Safe practices were observed	Subtasks performed with precision & economy of effort & action	Optimal (performance matches the quality standards listed in each subtask)
2	No Level 7-9 assists given, but occasional Level 1-6 assists given	Minor risks were evident but no assistance provided	Subtasks generally performed w/ precision & economy of effort & action; occasional lack of efficiency, redundant or extraneous action; no missing steps	Acceptable (Performance, for the most part, matches or nearly matches the quality standards listed in each subtask)
1	No Level 9 assists given; or occasional Level 7 or 8 assists given; or continuous Level 1-6 assists given	Risks to safety were observed and assistance given to prevent potential harm	Subtasks generally performed w/ lack of precision and/or economy of effort & action; consistent extraneous or redundant actions; steps may be missing	Marginal (Performance, for the most part, does not match the quality standards listed in each subtask)
0	Level 9 assists given; or continuous Level 7 or 8 assists given; or unable to initiate, continue, or complete subtask or task	Risks to safety of such severity were observed that task was stopped or taken over by assessor to prevent harm	Subtasks are consistently performed w/ lack of precision and/or economy of effort & action so that task progress is unattainable	Unacceptable (Performance does not match the quality standards listed in each subtask, perhaps with few exceptions)

Task # C5: FM: Bathtub and Shower Mobility		INDEPENDENCE DATA										SAFETY DATA	ADEQUACY DATA		
Assistive Technology Devices (ATDs) used during task: 1. 2. 3. Total # of ATDs used: _____		No Assistance	Verbal Supportive (Encouragement)	Verbal Non-Directive	Verbal Directive	Gestures	Task or Environment Rearrangement	Demonstration	Physical Guidance	Physical Support	Total Assist	INDEPENDENCE subtask scores	Unsafe Observations	PROCESS: Imprecision, lack of economy, missing steps	QUALITY: Standards not met / improvement needed
Assist level →		0	1	2	3	4	5	6	7	8	9				
Subtasks	Subtask Criteria														
1 Shower Tub	<u>Enters tub</u> in a <u>controlled</u> manner (lifts feet over tub side; does not hit foot against tub side; maintains balance when standing on one leg)														
2 Shower Tub	<u>Turns around (about 180 degrees &amp; back)</u> in a <u>controlled</u> manner (maintains balance; does not slip)														
3 Shower Tub	<u>Exits tub</u> in a <u>controlled</u> manner (lifts feet over tub side; does not hit foot against tub side; maintains balance when standing on one leg)														
4 Tub	<u>Enters tub</u> in a <u>controlled</u> manner (lifts feet over tub side; does not hit foot against tub side; maintains balance when standing on one leg)														
5 Tub	<u>Lowers self to a seated position</u> on tub bottom in a <u>controlled</u> manner (does not "plop" down)														
6 Tub	<u>Sits on tub bottom &amp; maintains balance</u> (does not hold onto tub sides or soap dish)														
7 Tub	<u>Raises self from tub bottom</u> in a <u>controlled</u> manner (does not "rock" to gain momentum)														
8 Tub	<u>Exits tub</u> in a <u>controlled</u> manner (lifts feet over tub side; does not hit foot against tub side; maintains balance when standing on one leg)														
9 Dress C7	<u>Removes shoes efficiently</u> (does not struggle to pull or push shoes off) and <u>completely</u> (toes out of shoes) [ <b>Copy ratings to Task # C7 – Dressing</b> ]														
10 Dress C7	<u>Doffs hosiery efficiently</u> (does not struggle to get hosiery over heel or toes) and <u>completely</u> (totally off toes) [ <b>Copy ratings to Task # C7 - Dressing</b> ]														

INDEPENDENCE MEAN SCORE

SAFETY SCORE

ADEQUACY SCORE

INDEPENDENCE MEAN SCORE

SAFETY SCORE

ADEQUACY SCORE

INDEPENDENCE MEAN SCORE

SAFETY SCORE

ADEQUACY SCORE

SUMMARY SCORES

## Task # C6: BADL: Trimming Toenails

**CLINIC CONDITIONS:** Bathroom area, paper towels, waste paper basket, and

1. Toenail scissors, toenail clipper, toenail nipper and a nail file
2. Sitting or standing position based on client's preference
3. Client with bare feet

\*Test following completion of Task # 5 – Bathtub and Shower Mobility

**\*\*DO NOT administer if Client has diabetes with neuropathy, is on blood thinner medication, or always uses a podiatrist (score 0)**

### CLINIC INSTRUCTIONS:

“Next I want you to demonstrate how you trim your toenails, but first I need to know if you sit or stand to trim your nails? [Wait for response and then accommodate Client's preference by using a chair, the bed, the toilet, etc.]

“Now, please show me how you trim your toenails. Use the tools you use at your home. [Hold out the 4 tools]. trim the 2 longest toenails on each foot. I need to have you do both feet since some people can do one foot but not the other. Do you know what you are to do?” [Wait for response]

SCORE	INDEPENDENCE	SAFETY	ADEQUACY	
			PROCESS	QUALITY
3	No assists given for task initiation, continuation, or completion	Safe practices were observed	Subtasks performed with precision & economy of effort & action	Optimal (performance matches the quality standards listed in each subtask)
2	No Level 7-9 assists given, but occasional Level 1-6 assists given	Minor risks were evident but no assistance provided	Subtasks generally performed w/ precision & economy of effort & action; occasional lack of efficiency, redundant or extraneous action; no missing steps	Acceptable (Performance, for the most part, matches or nearly matches the quality standards listed in each subtask)
1	No Level 9 assists given; or occasional Level 7 or 8 assists given; or continuous Level 1-6 assists given	Risks to safety were observed and assistance given to prevent potential harm	Subtasks generally performed w/ lack of precision and/or economy of effort & action; consistent extraneous or redundant actions; steps may be missing	Marginal (Performance, for the most part, does not match the quality standards listed in each subtask)
0	Level 9 assists given; or continuous Level 7 or 8 assists given; or unable to initiate, continue, or complete subtask or task	Risks to safety of such severity were observed that task was stopped or taken over by assessor to prevent harm	Subtasks are consistently performed w/ lack of precision and/or economy of effort & action so that task progress is unattainable	Unacceptable (Performance does not match the quality standards listed in each subtask, perhaps with few exceptions)



Task # C6: BADL: Trimming Toenails		INDEPENDENCE DATA										SAFETY DATA	ADEQUACY DATA		
Assistive Technology Devices (ATDs) used during task: 1. 2. 3. Total # of ATDs used: _____		No Assistance	Verbal Supportive (Encouragement)	Verbal Non-Directive	Verbal Directive	Gestures	Task or Environment Rearrangement	Demonstration	Physical Guidance	Physical Support	Total Assist	INDEPENDENCE subtask scores	Unsafe Observations	PROCESS: Imprecision, lack of economy, missing steps	QUALITY: Standards not met / improvement needed
Assist level →		0	1	2	3	4	5	6	7	8	9				
Subtasks	Subtask Criteria														
1	<u>Positions cutting tool correctly</u> (grasps tool by handle; tool is in operating position – nippers lock is released; lever of clipper is swiveled into position; grasps correct end of file)														
2	<u>Reaches each foot</u> (right & left) & <u>maintains balance</u> while trimming toenails (does not have to “chase” moving foot; does not need to grasp sink or “catch” self)														
3	<u>Uses cutting tool</u> in a <u>controlled</u> manner (inserts toenail into opening between blades of scissors, clipper, or nippers, or positions file at appropriate angle to nail; does not puncture or cut skin)														
4	<u>Trims nails</u> (2 on each foot) <u>adequately</u> (trims off entire edge of nail, cut is reasonably smooth and even)														

SUMMARY SCORES	
INDEPENDENCE MEAN SCORE	<div></div>
SAFETY SCORE	<div></div>
ADEQUACY SCORE	<div></div>

## Task # C7: BADL: Dressing

CLINIC CONDITIONS: Bedroom area, bed, chair, and

1. Cardigan sweater with medium-sized buttons, size extra-large  
NOTE: If Client is wearing an upper extremity garment that meets these specifications, he/she may doff and don it
2. Gym shorts, size extra-large available if needed  
NOTE: If Client is wearing a lower extremity garment, such as underpants, shorts, or slacks, he/she may doff and don it
3. Gym socks (large) in case Client does not have socks
4. Client's own shoes and socks
5. Client fully dressed except for shoes and socks

### CLINIC INSTRUCTIONS:

"The next task involves dressing. I need to see how you put on and remove upper body and lower body clothing.

"First, put on these gym shorts [Point to shorts]. Next, put on and button this sweater [Point to sweater]. [If Client has no socks, add] Then, put on and take off these socks. Do you know what you are to do?" [Wait for response]

"Now, take off the pants and sweater and put your socks/stockings and shoes back on." [Wait for response]

### ALTERNATE INSTRUCTIONS, IF CT IS WEARING A CARDIGAN OR BLOUSE WITH BUTTONS AND SLACKS/PANTS:

"The next task involves dressing." I need to see how you put on and remove upper body and lower body clothing."

"Since, you are wearing a sweater/blouse and slacks, if you wish you may simply take both of them off and then put them on again, [including buttoning the sweater] rather than using our shorts [Point to shorts]. Which do you prefer? [Wait for response. If Client chooses to use assessment clothing, give second and third set of directions above.] Start by removing your slacks, then your sweater/blouse. Do you know what you are to do?" [Wait for response]

"Now, put on your slacks and sweater/blouse and put your socks/stockings and shoes on too." [Wait for response]

SCORE	INDEPENDENCE	SAFETY	ADEQUACY	
			<u>PROCESS</u>	<u>QUALITY</u>
3	No assists given for task initiation, continuation, or completion	Safe practices were observed	Subtasks performed with precision & economy of effort & action	Optimal (performance matches the quality standards listed in each subtask)
2	No Level 7-9 assists given, but occasional Level 1-6 assists given	Minor risks were evident but no assistance provided	Subtasks generally performed w/ precision & economy of effort & action; occasional lack of efficiency, redundant or extraneous action; no missing steps	Acceptable (Performance, for the most part, matches or nearly matches the quality standards listed in each subtask)
1	No Level 9 assists given; or occasional Level 7 or 8 assists given; or continuous Level 1-6 assists given	Risks to safety were observed and assistance given to prevent potential harm	Subtasks generally performed w/ lack of precision and/or economy of effort & action; consistent extraneous or redundant actions; steps may be missing	Marginal (Performance, for the most part, does not match the quality standards listed in each subtask)
0	Level 9 assists given; or continuous Level 7 or 8 assists given; or unable to initiate, continue, or complete subtask or task	Risks to safety of such severity were observed that task was stopped or taken over by assessor to prevent harm	Subtasks are consistently performed w/ lack of precision and/or economy of effort & action so that task progress is unattainable	Unacceptable (Performance does not match the quality standards listed in each subtask, perhaps with few exceptions)

Task # C7: BADL: Dressing		INDEPENDENCE DATA										SAFETY DATA	ADEQUACY DATA		
Assistive Technology Devices (ATDs) used during task: 1. 2. 3. Total # of ATDs used: _____		No Assistance	Verbal Supportive (Encouragement)	Verbal Non-Directive	Verbal Directive	Gestures	Task or Environment Rearrangement	Demonstration	Physical Guidance	Physical Support	Total Assist	INDEPENDENCE subtask scores	Unsafe Observations	PROCESS: Imprecision, lack of economy, missing steps	QUALITY: Standards not met / improvement needed
Assist level →		0	1	2	3	4	5	6	7	8	9				
Subtasks	Subtask Criteria														
1 From # C5	<u>Removes shoes efficiently</u> (does not struggle to pull or push shoes off) & <u>completely</u> (toes out of shoes)														
2 From # C5	<u>Doffs hosiery efficiently</u> (does not struggle to get hosiery over heel or toes) & <u>completely</u> (totally off toes)														
3	<u>Dons lower extremity garment correctly</u> (orients the front to the front, puts only 1 leg in a pant leg) & <u>maintains balance</u> (does not have to "catch" self)														
4	<u>Dons upper extremity garment correctly</u> [uses only hands (no teeth); grips second sleeve on no more than the second try; clothing oriented on each body part]														
5	<u>Buttons upper extremity garment correctly</u> (fastens all buttons in the correct holes; does not fumble any button more than 2x)														
6	<u>Doffs upper extremity garment correctly</u> [uses only hands (no teeth); takes off only assessment clothing]														
7	<u>Doffs lower extremity garment correctly</u> (takes off only assessment clothing) & <u>maintains balance</u> (does not have to "catch" self)														
8	<u>Dons hosiery efficiently</u> (does not struggle) & <u>correctly</u> (hosiery has the outside out; heel of hosiery on heel of foot)														
9	<u>Dons shoes efficiently</u> (does not struggle) & <u>correctly</u> (R/L shoe is on R/L foot; heel of shoe is not crushed; foot is on bottom of shoe; fasteners are fastened)														

SUMMARY SCORES	
INDEPENDENCE MEAN SCORE	<input type="text"/>
SAFETY SCORE	<input type="text"/>
ADEQUACY SCORE	<input type="text"/>

## Task # C8: IADL-C: Shopping (Money Management)

### CLINIC CONDITIONS: Table and

1. 8 unopened cans, with local prices marked on the top of each box as follows:
  - 1) 1 (10 ¾ oz) can Campbell's Chicken Noodle soup
  - 2) 1 (8 oz) can Tomato sauce (different brand than can 7)
  - 3) 1 can local brand Chicken Noodle soup
  - 4) 1 (10 ¾ oz) can Campbell's Tomato Rice soup
  - 5) 1 (10 ¾ oz) can Campbell's Tomato soup
  - 6) 1 can local brand Tomato soup
  - 7) 1 (8 oz) can Tomato sauce (different brand than can 8)
  - 8) 1 (10 ¾ oz) can Campbell's Chicken and Rice soup
2. Envelope with 5 coupons; one coupon matches one of the local brand Tomato soup item (no other matches); matching coupon is 3<sup>rd</sup> coupon in envelope
3. Wallet with change purse, containing \$12.60 in real money in the following denominations:
 

In the wallet section: 5 - \$1.00 bills, 1-\$5.00 bill      In the coin section: 4-Quarters, 10-dimes, 10-nickels, 10-pennies
4. Typed grocery list that includes:
  - a. 1 can Campbell's Tomato Rice soup
  - b. 1 can local brand Chicken Noodle soup
  - c. 1 can Tomato sauce (brand not identified)
  - d. 1 can local brand Tomato soup (coupon item)
5. Grocery receipts for the 4 items (\$2.32 and \$2.35, depending on Tomato sauce chosen – receipts can be printed front to back)
6. Tablet, pencil, calculator, hand held magnifier
6. Client seated at table with cans arranged from left to right in the order given in #1 above; the grocery list, wallet, and items in #6 are positioned in front of the cans.

### CLINIC INSTRUCTIONS:

"Next we have a grocery shopping task for you to do."

"Here is a grocery list [Point to list]. Please select the items on the list from those on the table. Do you know what you are to do? Do you have everything that you need?" [Wait for response]

Keep selected cans in front of Client; push others aside

"Here is the grocery store receipt for the 4 items on the grocery list [Hand client appropriate receipt]. Pay me the exact amount for the groceries with the money in this wallet." [Point to wallet, then hold hand palm up and wait for response]

"The next shopping task includes coupons."

"There are several food coupons in this envelope [Hand Client envelope with coupons]. Check to see if any of the coupons match the items you purchased [Motion to 4 items]. If they do, use the coupons and this money [Hand Client \$2.00] to pay for just the coupon items. I will then give you change. Do you know what you are to do? Do you have everything that you need?" [Wait for response]

[When Client gives you the local brand Tomato soup, the coupon for 10¢, and \$1.00, give the Client 2 quarters and 4 pennies (54¢)...a 10¢ shortage].

"Here is your change. Did I give you the correct amount of change? [Wait for Client to count change]. How much change should I have given you?" [Wait for response]

SCORE	INDEPENDENCE	SAFETY	ADEQUACY	
			PROCESS	QUALITY
3	No assists given for task initiation, continuation, or completion	Safe practices were observed	Subtasks performed with precision & economy of effort & action	Optimal (performance matches the quality standards listed in each subtask)
2	No Level 7-9 assists given, but occasional Level 1-6 assists given	Minor risks were evident but no assistance provided	Subtasks generally performed w/ precision & economy of effort & action; occasional lack of efficiency, redundant or extraneous action; no missing steps	Acceptable (Performance, for the most part, matches or nearly matches the quality standards listed in each subtask)
1	No Level 9 assists given; or occasional Level 7 or 8 assists given; or continuous Level 1-6 assists given	Risks to safety were observed and assistance given to prevent potential harm	Subtasks generally performed w/ lack of precision and/or economy of effort & action; consistent extraneous or redundant actions; steps may be missing	Marginal (Performance, for the most part, does not match the quality standards listed in each subtask)
0	Level 9 assists given; or continuous Level 7 or 8 assists given; or unable to initiate, continue, or complete subtask or task	Risks to safety of such severity were observed that task was stopped or taken over by assessor to prevent harm	Subtasks are consistently performed w/ lack of precision and/or economy of effort & action so that task progress is unattainable	Unacceptable (Performance does not match the quality standards listed in each subtask, perhaps with few exceptions)

Task # C8: IADL-C: Shopping (Money Management)		INDEPENDENCE DATA										SAFETY DATA	ADEQUACY DATA		
Assistive Technology Devices (ATDs) used during task: 1. 2. 3. Total # of ATDs used: _____		No Assistance	Verbal Supportive (Encouragement)	Verbal Non-Directive	Verbal Directive	Gestures	Task or Environment Rearrangement	Demonstration	Physical Guidance	Physical Support	Total Assist	INDEPENDENCE subtask scores	Unsafe Observations	PROCESS: Imprecision, lack of economy, missing steps	QUALITY: Standards not met / improvement needed
Assist level →		0	1	2	3	4	5	6	7	8	9				
Subtasks	Subtask Criteria														
1	<u>Selects all 4 items</u> on the shopping list <u>correctly</u> (requires identification of items, followed by choice of items as indicated by Ct gathering items in one location, pointing to items etc.)														
2	<u>Selects</u> the <u>correct cash</u> for the 4 grocery items (cash given matches the receipt amount)														
3	<u>Selects</u> the <u>correct coupon</u> for the matching item (sets one coupon aside; gestures to matching item; places coupon on appropriate can)														
4	<u>Gives correct coupon &amp; \$1.00</u> to assessor (local brand Tomato soup coupon)														
5	<u>Identifies correctly</u> that change returned is wrong amount (too little) and <u>correctly</u> identifies the amount that should have been returned (64¢)														

SUMMARY SCORES	
INDEPENDENCE MEAN SCORE	<input type="text"/>
SAFETY SCORE	<input type="text"/>
ADEQUACY SCORE	<input type="text"/>

## Task # C9: IADL-C: Bill Paying by Check (Money Management)

### CLINIC CONDITIONS: Table and

1. 3 check form reproductions with lines for date, payable to, numerical amount payable, cursive amount payable, signature line, and notation line
2. Reproductions of 2 current, local utility bills with envelopes (e.g., water company, electric company); water bill=window envelope, electric bill=plain envelope
3. Ball point pen (black ink), tablet for calculations
4. Wall-sized calendar (approximately 8" x 11") showing the current month
5. Calculator and hand held magnifier
4. Client seated at a table with good lighting, with items 1 (checks) & 2 (bills with envelopes) stacked in front of Client, and item 3-5 available to the right of the stacked checks and bills/envelopes

### CLINIC INSTRUCTIONS:

"The next 3 tasks involve paying bills by check, balancing the checkbook ledger, and getting the bills and checks ready to put into the mailbox."

"First, pay these 2 utility bills using these checks..... an extra check is included if you need it. [Point to the 2 bills with their envelopes attached with paper clips, stacked with water bill on the bottom, electric bill in the middle, and the checks stacked on top]. Use today's date. If there are other items you usually use when you pay bills, feel free to use them. Do you know what you are to do? Do you have everything that you need?"  
[Wait for response]

SCORE	INDEPENDENCE	SAFETY	ADEQUACY	
			<u>PROCESS</u>	<u>QUALITY</u>
3	No assists given for task initiation, continuation, or completion	Safe practices were observed	Subtasks performed with precision & economy of effort & action	Optimal (performance matches the quality standards listed in each subtask)
2	No Level 7-9 assists given, but occasional Level 1-6 assists given	Minor risks were evident but no assistance provided	Subtasks generally performed w/ precision & economy of effort & action; occasional lack of efficiency, redundant or extraneous action; no missing steps	Acceptable (Performance, for the most part, matches or nearly matches the quality standards listed in each subtask)
1	No Level 9 assists given; or occasional Level 7 or 8 assists given; or continuous Level 1-6 assists given	Risks to safety were observed and assistance given to prevent potential harm	Subtasks generally performed w/ lack of precision and/or economy of effort & action; consistent extraneous or redundant actions; steps may be missing	Marginal (Performance, for the most part, does not match the quality standards listed in each subtask)
0	Level 9 assists given; or continuous Level 7 or 8 assists given; or unable to initiate, continue, or complete subtask or task	Risks to safety of such severity were observed that task was stopped or taken over by assessor to prevent harm	Subtasks are consistently performed w/ lack of precision and/or economy of effort & action so that task progress is unattainable	Unacceptable (Performance does not match the quality standards listed in each subtask, perhaps with few exceptions)

Task # C9: IADL-C: Bill Paying by Check (Money Management)		INDEPENDENCE DATA										SAFETY DATA	ADEQUACY DATA		
Assistive Technology Devices (ATDs) used during task:		No Assistance	Verbal Supportive (Encouragement)	Verbal Non-Directive	Verbal Directive	Gestures	Task or Environment Rearrangement	Demonstration	Physical Guidance	Physical Support	Total Assist	INDEPENDENCE subtask scores	Unsafe Observations	PROCESS: Imprecision, lack of economy, missing steps	QUALITY: Standards not met / improvement needed
1. 2. 3. Total # of ATDs used: _____															
Assist level →		0	1	2	3	4	5	6	7	8	9				
Subtasks	Subtask Criteria														
1 Water	<u>Writes the date correctly</u> (date of testing) & <u>legibly</u> (can be interpreted)														
2 Water	<u>Writes the name of the payee correctly</u> (name of utility company) & <u>legibly</u> (can be interpreted)														
3 Water	<u>Selects the correct amount to be paid</u> (payment on time; not the late payment amount)														
4 Water	<u>Writes the bill amount correctly</u> (amount corresponds to that on utility bill) & <u>legibly</u> (can be interpreted)														
5 Water	<u>Writes the bill amount in numerics correctly</u> (amount corresponds to that on utility bill) & <u>legibly</u> (can be interpreted)														
6 Water	<u>Writes the signature correctly</u> (writes first and last name) & <u>legibly</u> (can be interpreted)														
7 Electric	<u>Writes the date correctly</u> (date of testing) & <u>legibly</u> (can be interpreted)														
8 Electric	<u>Writes the name of the payee correctly</u> (name of utility company) & <u>legibly</u> (can be interpreted)														
9 Electric	<u>Selects the correct amount to be paid</u> (payment on time; not the late payment amount) based on self-stated preference (budget versus total payment)														
10 Electric	<u>Writes the bill amount correctly</u> (amount corresponds to that on utility bill) & <u>legibly</u> (can be interpreted)														
11 Electric	<u>Writes the bill amount in numerics correctly</u> (amount corresponds to that on utility bill) & <u>legibly</u> (can be interpreted)														
12 Electric	<u>Writes the signature correctly</u> (writes first and last name) & <u>legibly</u> (can be interpreted)														

SUMMARY SCORES	
INDEPENDENCE MEAN SCORE	<input type="text"/>
SAFETY SCORE	<input type="text"/>
ADEQUACY SCORE	<input type="text"/>

## Task # C10: IADL-C: Checkbook Balancing (Money Management)

### CLINIC CONDITIONS: Table and

1. Bills with envelopes and completed checks
2. Ball point pen (black ink), tablet for calculations, scissors
3. Wall-sized calendar (approximately 8" x 11") showing the current month
4. Calculator and hand held magnifier
3. Reproduction of one page from checkbook ledger with a balance of \$857.95 and check for \$12.83 payable to client (to be handed to Client by assessor)
4. Client seated at a table with good lighting, and with items 1-4 on the table

### CLINIC INSTRUCTIONS:

"Now, I need you to enter the checks you just wrote into this checkbook ledger [Place sheet with checkbook ledger and check to deposit in front of client] Before you balance the checking account, however, you need to add in this check for \$12.83 [Point to the check] which is made out to you. Do you know what you are to do? Do you have everything that you need?" [Wait for response]

SCORE	INDEPENDENCE	SAFETY	ADEQUACY	
			PROCESS	QUALITY
3	No assists given for task initiation, continuation, or completion	Safe practices were observed	Subtasks performed with precision & economy of effort & action	Optimal (performance matches the quality standards listed in each subtask)
2	No Level 7-9 assists given, but occasional Level 1-6 assists given	Minor risks were evident but no assistance provided	Subtasks generally performed w/ precision & economy of effort & action; occasional lack of efficiency, redundant or extraneous action; no missing steps	Acceptable (Performance, for the most part, matches or nearly matches the quality standards listed in each subtask)
1	No Level 9 assists given; or occasional Level 7 or 8 assists given; or continuous Level 1-6 assists given	Risks to safety were observed and assistance given to prevent potential harm	Subtasks generally performed w/ lack of precision and/or economy of effort & action; consistent extraneous or redundant actions; steps may be missing	Marginal (Performance, for the most part, does not match the quality standards listed in each subtask)
0	Level 9 assists given; or continuous Level 7 or 8 assists given; or unable to initiate, continue, or complete subtask or task	Risks to safety of such severity were observed that task was stopped or taken over by assessor to prevent harm	Subtasks are consistently performed w/ lack of precision and/or economy of effort & action so that task progress is unattainable	Unacceptable (Performance does not match the quality standards listed in each subtask, perhaps with few exceptions)



Task # C10: IADL-C: Checkbook Balancing (Money Management)		INDEPENDENCE DATA										SAFETY DATA	ADEQUACY DATA		
Assistive Technology Devices (ATDs) used during task: 1. 2. 3. Total # of ATDs used: _____		No Assistance	Verbal Supportive (Encouragement)	Verbal Non-Directive	Verbal Directive	Gestures	Task or Environment Rearrangement	Demonstration	Physical Guidance	Physical Support	Total Assist	INDEPENDENCE subtask scores	Unsafe Observations	PROCESS: Imprecision, lack of economy, missing steps	QUALITY: Standards not met / improvement needed
Assist level →		0	1	2	3	4	5	6	7	8	9				
Subtasks	Subtask Criteria														
1 Water	<u>Writes water company's check number legibly</u> (can be interpreted) & into <u>appropriate</u> column (item number)														
2 Water	<u>Writes water company's name legibly</u> (can be interpreted) or acceptable description into <u>appropriate</u> column (transaction description)														
3 Water	<u>Writes water company's check amount legibly</u> (can be interpreted) & into <u>appropriate</u> column (subtraction/debit)														
4 Elec.	<u>Writes electric company check number legibly</u> (can be interpreted) into <u>appropriate</u> column (item number)														
5 Elec.	<u>Writes electric company's name legibly</u> (can be interpreted) or acceptable description into <u>appropriate</u> column (transaction description)														
6 Elec.	<u>Writes electric company's check amount legibly</u> (can be interpreted) into <u>appropriate</u> column (subtraction/debit)														
7 Refund	<u>Writes refund check</u> (check written to client) <u>amount legibly</u> (can be interpreted) into <u>appropriate</u> column (additions/credits)														
8 Balance	<u>Calculates new balance correctly</u> (original checkbook balance – water – electricity + refund = new balance)														
9 Ledger	<u>Writes the new balance legibly</u> (can be interpreted)														

SUMMARY SCORES	
INDEPENDENCE MEAN SCORE	<input type="text"/>
SAFETY SCORE	<input type="text"/>
ADEQUACY SCORE	<input type="text"/>

## Task # C11: IADL-C: Mailing Bills (Money Management)

### CLINIC CONDITIONS: Table and

1. Bills with envelopes & completed checks
2. Ball point pen (black ink), tablet for calculations, scissors
3. Several (5-10) first class (forever) stamps and several (5-10) postcard stamps or stamps of a cost less than first class stamp cost [to be placed in front of Client]
4. Wall-sized calendar (approximately 8" x 11") showing the current month
5. Calculator and hand held magnifier
4. Client seated at a table with good lighting, and items 1-5 available on the table

### CLINIC INSTRUCTIONS:

[Place first class & postcard stamps in front of the Client]

"Next, please get the two utility bills and checks ready to be put into the mailbox. The materials that you need are on the table in front of you. Do you know what you are to do? Do you have everything that you need?" [Wait for a response]

SCORE	INDEPENDENCE	SAFETY	ADEQUACY	
			PROCESS	QUALITY
3	No assists given for task initiation, continuation, or completion	Safe practices were observed	Subtasks performed with precision & economy of effort & action	Optimal (performance matches the quality standards listed in each subtask)
2	No Level 7-9 assists given, but occasional Level 1-6 assists given	Minor risks were evident but no assistance provided	Subtasks generally performed w/ precision & economy of effort & action; occasional lack of efficiency, redundant or extraneous action; no missing steps	Acceptable (Performance, for the most part, matches or nearly matches the quality standards listed in each subtask)
1	No Level 9 assists given; or occasional Level 7 or 8 assists given; or continuous Level 1-6 assists given	Risks to safety were observed and assistance given to prevent potential harm	Subtasks generally performed w/ lack of precision and/or economy of effort & action; consistent extraneous or redundant actions; steps may be missing	Marginal (Performance, for the most part, does not match the quality standards listed in each subtask)
0	Level 9 assists given; or continuous Level 7 or 8 assists given; or unable to initiate, continue, or complete subtask or task	Risks to safety of such severity were observed that task was stopped or taken over by assessor to prevent harm	Subtasks are consistently performed w/ lack of precision and/or economy of effort & action so that task progress is unattainable	Unacceptable (Performance does not match the quality standards listed in each subtask, perhaps with few exceptions)

Task # C11: IADL-C: Mailing Bills (Money Management)		INDEPENDENCE DATA										SAFETY DATA	ADEQUACY DATA		
Assistive Technology Devices (ATDs) used during task: 1. 2. 3. Total # of ATDs used: _____		No Assistance	Verbal Supportive (Encouragement)	Verbal Non-Directive	Verbal Directive	Gestures	Task or Environment Rearrangement	Demonstration	Physical Guidance	Physical Support	Total Assist	INDEPENDENCE subtask scores	Unsafe Observations	PROCESS: Imprecision, lack of economy, missing steps	QUALITY: Standards not met / improvement needed
Assist level →		0	1	2	3	4	5	6	7	8	9				
Subtasks	Subtask Criteria														
1	<u>Tears off return portion of bills correctly</u> (tears/cuts on line; no essential information is missing)														
Water Elec.															
2	<u>Inserts correct items into correct envelope</u> (check inserted & bill address visible; window envelope)														
Water															
3	<u>Writes return address on envelope correctly</u> ( addresser, street address, city, state , zip code in upper left hand corner or on back of envelope)														
Water															
4	<u>Selects first class stamp and secures it correctly</u> (first class stamp on upper right hand corner of envelope)														
Water															
5	<u>Seals envelope securely</u> (flap is sealed, does not open)														
Water															
6	<u>Addresses envelope correctly</u> (addressee, street address, city, state, zip code on body of envelope)														
Elec.															
7	<u>Inserts correct items into envelope</u> (check & return portion of bill)														
Elec.															
8	<u>Writes return address on envelope correctly</u> (addresser, street address, city, state , zip code in upper left hand corner or on back of envelope)														
Elec.															
9	<u>Selects first class stamp and secures it correctly</u> (first class stamp on upper right hand corner of envelope)														
Elec.															
10	<u>Seals envelope securely</u> (flap is secure, does not open)														
Elec.															

ADEQUACY  
SCORE

SAFETY  
SCORE

INDEPENDENCE  
MEAN SCORE

**SUMMARY SCORES**

## Task # C12: IADL-P Taking Out Garbage; Key Use (Heavy Housework)

**CLINIC CONDITIONS:** Room with a door that locks automatically and can be opened with a key, and

1. A plastic garbage sack on floor, containing 8 unopened cans from shopping task, tied so that cans cannot rotate
2. Client standing beside sack, approximately 10 feet from door [inside], holding key to door

### CLINIC INSTRUCTIONS:

"The next task involves carrying out the garbage. Here is the key so that you can let us back into the apartment. [Hand Client key ring with key]. First, pick up the garbage sack and carry it out the door [Point]. Then put down the sack and close the door. I will be coming with you. Do you know what you are to do?" [Wait for response, and follow Client out the door]

### Outside of door

"Now please open the door so that we can get back into the house (apartment). I'll take the garbage sack." [Wait for response]

SCORE	INDEPENDENCE	SAFETY	ADEQUACY	
			PROCESS	QUALITY
3	No assists given for task initiation, continuation, or completion	Safe practices were observed	Subtasks performed with precision & economy of effort & action	Optimal (performance matches the quality standards listed in each subtask)
2	No Level 7-9 assists given, but occasional Level 1-6 assists given	Minor risks were evident but no assistance provided	Subtasks generally performed w/ precision & economy of effort & action; occasional lack of efficiency, redundant or extraneous action; no missing steps	Acceptable (Performance, for the most part, matches or nearly matches the quality standards listed in each subtask)
1	No Level 9 assists given; or occasional Level 7 or 8 assists given; or continuous Level 1-6 assists given	Risks to safety were observed and assistance given to prevent potential harm	Subtasks generally performed w/ lack of precision and/or economy of effort & action; consistent extraneous or redundant actions; steps may be missing	Marginal (Performance, for the most part, does not match the quality standards listed in each subtask)
0	Level 9 assists given; or continuous Level 7 or 8 assists given; or unable to initiate, continue, or complete subtask or task	Risks to safety of such severity were observed that task was stopped or taken over by assessor to prevent harm	Subtasks are consistently performed w/ lack of precision and/or economy of effort & action so that task progress is unattainable	Unacceptable (Performance does not match the quality standards listed in each subtask, perhaps with few exceptions)

Task # C12: IADL-P: Taking Out the Garbage (Heavy Housework)		INDEPENDENCE DATA										SAFETY DATA	ADEQUACY DATA		
Assistive Technology Devices (ATDs) used during task: 1. 2. 3. Total # of ATDs used: _____		No Assistance	Verbal Supportive (Encouragement)	Verbal Non-Directive	Verbal Directive	Gestures	Task or Environment Rearrangement	Demonstration	Physical Guidance	Physical Support	Total Assist	INDEPENDENCE subtask scores	Unsafe Observations	PROCESS: Imprecision, lack of economy, missing steps	QUALITY: Standards not met / improvement needed
Assist level →		0	1	2	3	4	5	6	7	8	9				
Subtasks	Subtask Criteria														
1	<u>Picks up sack</u> from floor & <u>maintains balance</u> (does not reach to "catch" self; does not shuffle feet to regain posture)														
2	<u>Lifts sack</u> in a <u>controlled</u> manner (not jerky; sack doesn't swing out)														
3	<u>Carries sack</u> & <u>maintains balance</u> (does not lean into sack; does not lean opposite of sack; does not reach to "catch" self)														
4	<u>Opens door wide enough</u> to walk through it with the sack (does not bump into door or doorframe when exiting)														
5	<u>Lowers sack to floor</u> in a <u>controlled</u> manner (does not drop sack; a "thud" is not heard when cans are placed on floor)														
6	<u>Pivots self around</u> to face door & <u>maintains balance</u> (does not reach for wall for support; does not reach to "catch" self)														
7	<u>Closes door</u> in a <u>controlled</u> manner (does not shut door on foot) & <u>maintains balance</u> (does not reach for wall for support; does not reach to "catch" self)														
8	<u>Reopens door using key within 3 tries</u> (no more than 3 clicks of the key or "snapping" of the lock are heard)														

SUMMARY SCORES	
INDEPENDENCE MEAN SCORE	<input type="text"/>
SAFETY SCORE	<input type="text"/>
ADEQUACY SCORE	<input type="text"/>

### Task # C13: IADL-C: Telephone Use

CLINIC CONDITIONS: Location where telephone is easy to access and

1. Telephone (dial, pushbutton or cell, depending on type used by Client in home environment)
2. The local Consumers Yellow Pages Directory
3. A tablet and a pen
4. Hand held magnifier
5. Client seated at table with items 1-4 on table in front of Client

### CLINIC INSTRUCTIONS:

"Do you use a dial, pushbutton, or cell phone at home?" [Response determines which phone is used in the clinic]

"Please call the pharmacy where you usually purchase your medicines – or one that is in your community. Find out what time the store opens tomorrow. After you hang up, tell me what the person or automatic recording says. Do you know what you are to do? Do you have everything you that need?" [Wait for response]

SCORE	INDEPENDENCE	SAFETY	ADEQUACY	
			<u>PROCESS</u>	<u>QUALITY</u>
3	No assists given for task initiation, continuation, or completion	Safe practices were observed	Subtasks performed with precision & economy of effort & action	Optimal (performance matches the quality standards listed in each subtask)
2	No Level 7-9 assists given, but occasional Level 1-6 assists given	Minor risks were evident but no assistance provided	Subtasks generally performed w/ precision & economy of effort & action; occasional lack of efficiency, redundant or extraneous action; no missing steps	Acceptable (Performance, for the most part, matches or nearly matches the quality standards listed in each subtask)
1	No Level 9 assists given; or occasional Level 7 or 8 assists given; or continuous Level 1-6 assists given	Risks to safety were observed and assistance given to prevent potential harm	Subtasks generally performed w/ lack of precision and/or economy of effort & action; consistent extraneous or redundant actions; steps may be missing	Marginal (Performance, for the most part, does not match the quality standards listed in each subtask)
0	Level 9 assists given; or continuous Level 7 or 8 assists given; or unable to initiate, continue, or complete subtask or task	Risks to safety of such severity were observed that task was stopped or taken over by assessor to prevent harm	Subtasks are consistently performed w/ lack of precision and/or economy of effort & action so that task progress is unattainable	Unacceptable (Performance does not match the quality standards listed in each subtask, perhaps with few exceptions)

Task # C13: IADL-C: Telephone Use		INDEPENDENCE DATA										SAFETY DATA	ADEQUACY DATA		
Assistive Technology Devices (ATDs) used during task: 1. 2. 3. Total # of ATDs used: _____		No Assistance	Verbal Supportive (Encouragement)	Verbal Non-Directive	Verbal Directive	Gestures	Task or Environment Rearrangement	Demonstration	Physical Guidance	Physical Support	Total Assist	INDEPENDENCE subtask scores	Unsafe Observations	PROCESS: Imprecision, lack of economy, missing steps	QUALITY: Standards not met / improvement needed
Assist level →		0	1	2	3	4	5	6	7	8	9				
Subtasks	Subtask Criteria														
1	<u>Obtains correct number</u> of pharmacy (from phone book, operator, personal phone list, memory, etc.)														
2	<u>Lifts telephone receiver correctly</u> (ear piece to ear; mouth piece to mouth)														
3	<u>Dials pharmacy number correctly</u> (number dialed corresponds to the one selected)														
4	<u>Obtains information correctly</u> (Clinic=opening time)														
5	<u>Concludes</u> call <u>appropriately</u> if real person (good bye; thank you, to let store employee know that the call has concluded & no more information is needed; if automated—hangs up)														
6	<u>Replaces</u> telephone <u>receiver securely</u> if dial/pushbutton (line is closed); <u>Pushes off button correctly</u> if cell (line is closed)														
7	<u>Reports information</u> that is <u>plausible</u> ("typical" hours)														

SUMMARY SCORES	
INDEPENDENCE MEAN SCORE	<input type="text"/>
SAFETY SCORE	<input type="text"/>
ADEQUACY SCORE	<input type="text"/>

## Task # C14: IADL-C Medication Management

### CLINIC CONDITIONS: Table and

1. Seven-day medication sheet with 4 subdivisions for each day – Morning, Noon, Evening, Bedtime
2. Hand held magnifier, calendar opened to current month
3. 1 prescription type bottle with child-proof lid (C-P) containing red vitamin pills (candies) and a typed label that reads "Take 1 after each meal and at bedtime";
4. 1 prescription type bottle with non-child-proof lid (N-C-P) containing yellow vitamin pills (candies) and a typed label that reads "Take 1 with breakfast and 1 at bedtime."
5. Wall clock
6. Items 1-2 on table in front of Client; Medication organizer directly in front of Client, calendar and magnifier at top of organizer
7. Client seated at the table with wall clock visible

### CLINIC INSTRUCTIONS:

"The next task involves managing medications.

"Please read the prescription label and find the directions for taking this medication [Hand Client bottle with child-proof lid and wait until Client looks up]. If you were taking this medication today, when would you have to take the next pill?" [Wait for response].

"This medication organizer is like a pillbox. It has the days of the week across the top [Point] and the time of the day [Point] along the side. Using the organizer, distribute the pills to be taken tomorrow and the following day according to the directions on the prescription label. Do you know what you are to do? Do you have everything that you need?" [Wait for response]

"Now, please read the prescription label on this bottle and find the directions for taking this medication [Hand Client bottle with non-child-proof lid and wait until Client looks up]. If you were taking this medication today, when would you have to take the next pill?" [Wait for response]

"Again, using the organizer, distribute the pills to be taken tomorrow and the following day according to the prescription directions on the label. Do you know what you are to do?" [Wait for response]

SCORE	INDEPENDENCE	SAFETY	ADEQUACY	
			PROCESS	QUALITY
3	No assists given for task initiation, continuation, or completion	Safe practices were observed	Subtasks performed with precision & economy of effort & action	Optimal (performance matches the quality standards listed in each subtask)
2	No Level 7-9 assists given, but occasional Level 1-6 assists given	Minor risks were evident but no assistance provided	Subtasks generally performed w/ precision & economy of effort & action; occasional lack of efficiency, redundant or extraneous action; no missing steps	Acceptable (Performance, for the most part, matches or nearly matches the quality standards listed in each subtask)
1	No Level 9 assists given; or occasional Level 7 or 8 assists given; or continuous Level 1-6 assists given	Risks to safety were observed and assistance given to prevent potential harm	Subtasks generally performed w/ lack of precision and/or economy of effort & action; consistent extraneous or redundant actions; steps may be missing	Marginal (Performance, for the most part, does not match the quality standards listed in each subtask)
0	Level 9 assists given; or continuous Level 7 or 8 assists given; or unable to initiate, continue, or complete subtask or task	Risks to safety of such severity were observed that task was stopped or taken over by assessor to prevent harm	Subtasks are consistently performed w/ lack of precision and/or economy of effort & action so that task progress is unattainable	Unacceptable (Performance does not match the quality standards listed in each subtask, perhaps with few exceptions)



Task # C14: IADL-C: Medication Management		INDEPENDENCE DATA										SAFETY DATA	ADEQUACY DATA		
Assistive Technology Devices (ATDs) used during task: 1. 2. 3. Total # of ATDs used: _____		No Assistance	Verbal Supportive (Encouragement)	Verbal Non-Directive	Verbal Directive	Gestures	Task or Environment Rearrangement	Demonstration	Physical Guidance	Physical Support	Total Assist	INDEPENDENCE subtask scores	Unsafe Observations	PROCESS: Imprecision, lack of economy, missing steps	QUALITY: Standards not met / improvement needed
Assist level →		0	1	2	3	4	5	6	7	8	9				
Subtasks	Subtask Criteria														
1 Med 1 C-P*	<u>Reports next time</u> first medication is to be taken <u>correctly</u> (based on testing time, matches direction on label)														
2 Med 1 C-P	<u>Opens first pill bottle with ease</u> (by second try)														
3 Med 1 C-P	<u>Distributes pills from first pill bottle</u> into <u>correct time slots for the next 2 days</u> (all pills & all slots indicated; days indicated)														
4 Med2 N-C-P*	<u>Reports next time</u> second medication is to be taken <u>correctly</u> (based on testing time, matches direction on label)														
5 Med2 N-C-P	<u>Opens second pill bottle with ease</u> (by second try)														
6 Med2 N-C-P	<u>Distributes pills from second pill bottle</u> into <u>correct time slots for the next 2 days</u> (all pills and all slots indicated; days indicated)														

SUMMARY SCORES	
INDEPENDENCE MEAN SCORE	<input type="text"/>
SAFETY SCORE	<input type="text"/>
ADEQUACY SCORE	<input type="text"/>

### Task # C15: IADL-P: Changing Bed Linens (Heavy Housework)

CLINIC CONDITIONS: Bedroom area with bed and chair, and

1. Bed made with bottom and top sheet, pillow in pillow case, and a bedspread
2. Bed pulled out from wall far enough for Client to walk safely around the bed
3. Chair near the bed to place linens on
4. Client facing one side of the bed

### CLINIC INSTRUCTIONS:

"Next please show me how you change your bed linens. Just remove the items already on the bed, and take the pillow out of its case. You can store the items on the chair [Point to chair] until you are ready to remake the bed. Do you know what you are to do? Do you have everything that you need? [Wait for a response]"

SCORE	INDEPENDENCE	SAFETY	ADEQUACY	
			<u>PROCESS</u>	<u>QUALITY</u>
3	No assists given for task initiation, continuation, or completion	Safe practices were observed	Subtasks performed with precision & economy of effort & action	Optimal (performance matches the quality standards listed in each subtask)
2	No Level 7-9 assists given, but occasional Level 1-6 assists given	Minor risks were evident but no assistance provided	Subtasks generally performed w/ precision & economy of effort & action; occasional lack of efficiency, redundant or extraneous action; no missing steps	Acceptable (Performance, for the most part, matches or nearly matches the quality standards listed in each subtask)
1	No Level 9 assists given; or occasional Level 7 or 8 assists given; or continuous Level 1-6 assists given	Risks to safety were observed and assistance given to prevent potential harm	Subtasks generally performed w/ lack of precision and/or economy of effort & action; consistent extraneous or redundant actions; steps may be missing	Marginal (Performance, for the most part, does not match the quality standards listed in each subtask)
0	Level 9 assists given; or continuous Level 7 or 8 assists given; or unable to initiate, continue, or complete subtask or task	Risks to safety of such severity were observed that task was stopped or taken over by assessor to prevent harm	Subtasks are consistently performed w/ lack of precision and/or economy of effort & action so that task progress is unattainable	Unacceptable (Performance does not match the quality standards listed in each subtask, perhaps with few exceptions)

Task # C15: IADL-P: Changing Bed Linens (Heavy Housework)		INDEPENDENCE DATA										SAFETY DATA	ADEQUACY DATA		
Assistive Technology Devices (ATDs) used during task: 1. 2. 3. Total # of ATDs used: _____		No Assistance	Verbal Supportive (Encouragement)	Verbal Non-Directive	Verbal Directive	Gestures	Task or Environment Rearrangement	Demonstration	Physical Guidance	Physical Support	Total Assist	INDEPENDENCE subtask scores	Unsafe Observations	PROCESS: Imprecision, lack of economy, missing steps	QUALITY: Standards not met / improvement needed
Assist level →		0	1	2	3	4	5	6	7	8	9				
Subtasks	Subtask Criteria														
1	<u>Removes all bed linens</u> & <u>maintains balance</u> (removes everything except the mattress pad; does not “catch” self on bed or other furniture; does not trip)														
2	<u>Puts on bottom sheet</u> with <u>no edges touching floor</u> (sheet tucked in under mattress) & <u>maintains balance</u> (does not “catch” self on bed or other furniture; does not trip)														
3	<u>Puts on</u> & tucks in <u>top sheet</u> with <u>no edges touching floor</u> (edges of sheet hanging off bed do not reach shoe tops) & <u>maintains balance</u> (does not “catch” self on bed or other furniture; does not trip)														
4	<u>Puts on spread</u> with <u>no edges touching floor</u> (edges of spread hanging off bed do not reach shoe tops) & <u>maintains balance</u> (does not “catch” self on bed or other furniture; does not trip)														
5	<u>Puts pillow into pillow case</u> with <u>no more than 2 tries to locate opening</u> (no part of pillow remains outside of pillow case) & <u>maintains balance</u> (does not “catch” self on bed or other furniture; does not trip)														
6	<u>Places pillow at head of bed</u> (end that top sheet is not tucked into) & <u>maintains balance</u> (does not “catch” self on bed or other furniture)														

SUMMARY SCORES	
INDEPENDENCE MEAN SCORE	<input type="text"/>
SAFETY SCORE	<input type="text"/>
ADEQUACY SCORE	<input type="text"/>

## Task # C16: IADL-C: Obtaining Critical Information from the Media (Auditory)

### CLINIC CONDITIONS: Table and

1. Audiotape recorder/playback machine with good tone
2. Audiotape with a voice reading a warning for contaminated water
3. Client seated at the table in front of playback machine

### CLINIC INSTRUCTIONS:

"I am going to play a recording of a radio announcement and I want you to listen to the announcement and then tell me what it was about. Do you know what you are to do?"

**Play Recording**

"What was that announcement about?" [Wait for a response]

"Tell me one thing you might do after hearing that announcement" [Wait for response]

SCORE	INDEPENDENCE	SAFETY	ADEQUACY	
			PROCESS	QUALITY
3	No assists given for task initiation, continuation, or completion	Safe practices were observed	Subtasks performed with precision & economy of effort & action	Optimal (performance matches the quality standards listed in each subtask)
2	No Level 7-9 assists given, but occasional Level 1-6 assists given	Minor risks were evident but no assistance provided	Subtasks generally performed w/ precision & economy of effort & action; occasional lack of efficiency, redundant or extraneous action; no missing steps	Acceptable (Performance, for the most part, matches or nearly matches the quality standards listed in each subtask)
1	No Level 9 assists given; or occasional Level 7 or 8 assists given; or continuous Level 1-6 assists given	Risks to safety were observed and assistance given to prevent potential harm	Subtasks generally performed w/ lack of precision and/or economy of effort & action; consistent extraneous or redundant actions; steps may be missing	Marginal (Performance, for the most part, does not match the quality standards listed in each subtask)
0	Level 9 assists given; or continuous Level 7 or 8 assists given; or unable to initiate, continue, or complete subtask or task	Risks to safety of such severity were observed that task was stopped or taken over by assessor to prevent harm	Subtasks are consistently performed w/ lack of precision and/or economy of effort & action so that task progress is unattainable	Unacceptable (Performance does not match the quality standards listed in each subtask, perhaps with few exceptions)

Task # C16: IADL-C: Obtaining Critical Information (Auditory)		INDEPENDENCE DATA										SAFETY DATA	ADEQUACY DATA		
Assistive Technology Devices (ATDs) used during task: 1. 2. 3. Total # of ATDs used: _____		No Assistance	Verbal Supportive (Encouragement)	Verbal Non-Directive	Verbal Directive	Gestures	Task or Environment Rearrangement	Demonstration	Physical Guidance	Physical Support	Total Assist	INDEPENDENCE subtask scores	Unsafe Observations	PROCESS: Imprecision, lack of economy, missing steps	QUALITY: Standards not met / improvement needed
Assist level →		0	1	2	3	4	5	6	7	8	9				
Subtasks	Subtask Criteria														
1	<u>Reports the problem accurately</u> (Clinic=contaminated water)														
2	<u>Reports an action to be taken</u> as a result of the problem that is <u>plausible</u> (Clinic=boil water, buy bottled water)														

SUMMARY SCORES	
ADEQUACY SCORE	INDEPENDENCE MEAN SCORE
<input type="text"/>	<input type="text"/>
SAFETY SCORE	
<input type="text"/>	

# **Task # C17: IADL-C: Obtaining Critical Information from the Media (Visual)**

## **CLINIC CONDITIONS:** Table and

1. Newspaper article about hypothermia or heat stroke, depending on season
2. Hand held magnifier
3. Client seated at table

## **CLINIC INSTRUCTIONS:**

"Here is a newspaper article [Hand article to Client]. Please take a few minutes to read it" [Allow time for reading]

"Can you tell me what the article was about?" [Wait for response]

"If you read this article in your local paper, and you were in this situation, what is one thing you might do after reading the article?" [Wait for response]

SCORE	INDEPENDENCE	SAFETY	ADEQUACY	
			<u>PROCESS</u>	<u>QUALITY</u>
3	No assists given for task initiation, continuation, or completion	Safe practices were observed	Subtasks performed with precision & economy of effort & action	Optimal (performance matches the quality standards listed in each subtask)
2	No Level 7-9 assists given, but occasional Level 1-6 assists given	Minor risks were evident but no assistance provided	Subtasks generally performed w/ precision & economy of effort & action; occasional lack of efficiency, redundant or extraneous action; no missing steps	Acceptable (Performance, for the most part, matches or nearly matches the quality standards listed in each subtask)
1	No Level 9 assists given; or occasional Level 7 or 8 assists given; or continuous Level 1-6 assists given	Risks to safety were observed and assistance given to prevent potential harm	Subtasks generally performed w/ lack of precision and/or economy of effort & action; consistent extraneous or redundant actions; steps may be missing	Marginal (Performance, for the most part, does not match the quality standards listed in each subtask)
0	Level 9 assists given; or continuous Level 7 or 8 assists given; or unable to initiate, continue, or complete subtask or task	Risks to safety of such severity were observed that task was stopped or taken over by assessor to prevent harm	Subtasks are consistently performed w/ lack of precision and/or economy of effort & action so that task progress is unattainable	Unacceptable (Performance does not match the quality standards listed in each subtask, perhaps with few exceptions)

Task # C17: IADL-C: Obtaining Critical Information (Visual)		INDEPENDENCE DATA										SAFETY DATA	ADEQUACY DATA		
Assistive Technology Devices (ATDs) used during task: 1. 2. 3. Total # of ATDs used: _____		No Assistance	Verbal Supportive (Encouragement)	Verbal Non-Directive	Verbal Directive	Gestures	Task or Environment Rearrangement	Demonstration	Physical Guidance	Physical Support	Total Assist	INDEPENDENCE subtask scores	Unsafe Observations	PROCESS: Imprecision, lack of economy, missing steps	QUALITY: Standards not met / improvement needed
Assist level →		0	1	2	3	4	5	6	7	8	9				
Subtasks	Subtask Criteria														
1	<u>Reports the problem accurately</u> (Clinic=hypothermia/heat stroke, depending on season)														
2	<u>Reports an action</u> to be taken as a result of the problem that is <u>plausible</u> (Clinic—Hypothermia=stay inside, but if going outside dress in layers, cover all exposed skin, wear a warm hat that covers head and ears, wear insulated and waterproof footwear) (Clinic—Heat stroke=keep air circulating, force fluids, stay inside during hottest part of day, no alcoholic beverages, wear light-colored and light weight natural fibers that breathe)														

SUMMARY SCORES	
INDEPENDENCE MEAN SCORE	<input type="text"/>
SAFETY SCORE	<input type="text"/>
ADEQUACY SCORE	<input type="text"/>

## Task # C18: IADL-C: Flashlight Repair (Home Maintenance)

### CLINIC CONDITIONS: Table and

1. Standard flashlight that contains 2 good Brand A batteries and 1 burned out bulb
2. Clear plastic bag containing
  - 2 correct size dead flashlight batteries (Brand B)
  - 1 operational light bulb
  - Schematic of how batteries fit into flashlight
3. Hand held magnifier
4. Items 1-3 on table in front of Client
5. Client seated at table

### CLINIC INSTRUCTIONS:

"Next, I have a home maintenance problem for you to solve. This flashlight doesn't work and I want you to see if you can fix it. Here are some supplies you may need [Point to plastic bag]. Do you know what you are to do?" [Wait for a response]

SCORE	INDEPENDENCE	SAFETY	ADEQUACY	
			<u>PROCESS</u>	<u>QUALITY</u>
3	No assists given for task initiation, continuation, or completion	Safe practices were observed	Subtasks performed with precision & economy of effort & action	Optimal (performance matches the quality standards listed in each subtask)
2	No Level 7-9 assists given, but occasional Level 1-6 assists given	Minor risks were evident but no assistance provided	Subtasks generally performed w/ precision & economy of effort & action; occasional lack of efficiency, redundant or extraneous action; no missing steps	Acceptable (Performance, for the most part, matches or nearly matches the quality standards listed in each subtask)
1	No Level 9 assists given; or occasional Level 7 or 8 assists given; or continuous Level 1-6 assists given	Risks to safety were observed and assistance given to prevent potential harm	Subtasks generally performed w/ lack of precision and/or economy of effort & action; consistent extraneous or redundant actions; steps may be missing	Marginal (Performance, for the most part, does not match the quality standards listed in each subtask)
0	Level 9 assists given; or continuous Level 7 or 8 assists given; or unable to initiate, continue, or complete subtask or task	Risks to safety of such severity were observed that task was stopped or taken over by assessor to prevent harm	Subtasks are consistently performed w/ lack of precision and/or economy of effort & action so that task progress is unattainable	Unacceptable (Performance does not match the quality standards listed in each subtask, perhaps with few exceptions)



Task # C18: IADL-C: Flashlight Repair (Home Maintenance)		INDEPENDENCE DATA										SAFETY DATA	ADEQUACY DATA		
Assistive Technology Devices (ATDs) used during task: 1. 2. 3. Total # of ATDs used: _____		No Assistance	Verbal Supportive (Encouragement)	Verbal Non-Directive	Verbal Directive	Gestures	Task or Environment Rearrangement	Demonstration	Physical Guidance	Physical Support	Total Assist	INDEPENDENCE subtask scores	Unsafe Observations	PROCESS: Imprecision, lack of economy, missing steps	QUALITY: Standards not met / improvement needed
Assist level →		0	1	2	3	4	5	6	7	8	9				
Subtasks	Subtask Criteria														
1	<u>Manipulates the flashlight parts adequately</u> to determine problem (unscrews end or top; Clinic=replaces burned out bulb)														
2	<u>Identifies the problem correctly</u> (Clinic=burned out bulb)														
3	<u>Solves the problem correctly</u> (flashlight is operational)														

SUMMARY SCORES	
INDEPENDENCE MEAN SCORE	<input type="text"/>
SAFETY SCORE	<input type="text"/>
ADEQUACY SCORE	<input type="text"/>

### Task # C19: IADL-P: Sweeping (Home Maintenance)

CLINIC CONDITIONS: Floor area near kitchen table and

1. Broom in corner of room
2. Dust pan – Regular in corner
3. Dust pan – Extended handle in corner
4. ½ cup of dry cereal spilled on kitchen floor over a 12 inch area
5. Client standing next to table

### CLINIC INSTRUCTIONS:

“The next task is to clean up the cereal that I spilled on the floor.” Do you know what you are to do? [Wait for a response]

SCORE	INDEPENDENCE	SAFETY	ADEQUACY	
			PROCESS	QUALITY
3	No assists given for task initiation, continuation, or completion	Safe practices were observed	Subtasks performed with precision & economy of effort & action	Optimal (performance matches the quality standards listed in each subtask)
2	No Level 7-9 assists given, but occasional Level 1-6 assists given	Minor risks were evident but no assistance provided	Subtasks generally performed w/ precision & economy of effort & action; occasional lack of efficiency, redundant or extraneous action; no missing steps	Acceptable (Performance, for the most part, matches or nearly matches the quality standards listed in each subtask)
1	No Level 9 assists given; or occasional Level 7 or 8 assists given; or continuous Level 1-6 assists given	Risks to safety were observed and assistance given to prevent potential harm	Subtasks generally performed w/ lack of precision and/or economy of effort & action; consistent extraneous or redundant actions; steps may be missing	Marginal (Performance, for the most part, does not match the quality standards listed in each subtask)
0	Level 9 assists given; or continuous Level 7 or 8 assists given; or unable to initiate, continue, or complete subtask or task	Risks to safety of such severity were observed that task was stopped or taken over by assessor to prevent harm	Subtasks are consistently performed w/ lack of precision and/or economy of effort & action so that task progress is unattainable	Unacceptable (Performance does not match the quality standards listed in each subtask, perhaps with few exceptions)

Task # C19: IADL-P: Sweeping (Home Maintenance)		INDEPENDENCE DATA										SAFETY DATA	ADEQUACY DATA		
Assistive Technology Devices (ATDs) used during task: 1. 2. 3. Total # of ATDs used: _____		No Assistance	Verbal Supportive (Encouragement)	Verbal Non-Directive	Verbal Directive	Gestures	Task or Environment Rearrangement	Demonstration	Physical Guidance	Physical Support	Total Assist	INDEPENDENCE subtask scores	Unsafe Observations	PROCESS: Imprecision, lack of economy, missing steps	QUALITY: Standards not met / improvement needed
Assist level →		0	1	2	3	4	5	6	7	8	9				
Subtasks	Subtask Criteria														
1	<u>Sweeps all cereal into a dust pan</u> & <u>maintains balance</u> (no cereal remains on floor; does not attempt to support self on broom or dust pan)														
2	<u>Dumps all cereal</u> from dust pan <u>into garbage receptacle</u> & <u>maintains balance</u> (no cereal remains in dust pan & no cereal is on the floor by the garbage receptacle; does not attempt to “catch” self on wall, broom, dust pan)														

SUMMARY SCORES	
<div> <div>ADEQUACY SCORE</div> <div> <input type="text"/> </div> </div>	<div> <div>SAFETY SCORE</div> <div> <input type="text"/> </div> </div>
<div> <div>INDEPENDENCE MEAN SCORE</div> <div> <input type="text"/> </div> </div>	

## Task # C20: FM: Indoor Walking

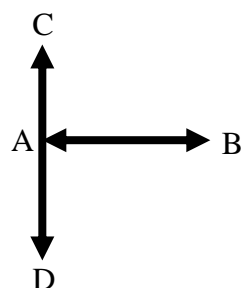
**CLINIC CONDITIONS:** Total clinic apartment with no scatter rugs, and

1. Use of walking aid if normally used
2. Client standing next to assessor on one side of clinic apartment

### CLINIC INSTRUCTIONS:

"The next task is walking. For this task you need to criss-cross your home. Start here (at point A) next to me. First walk across this clinic to [Point to B and name an object] and return to me. [Wait for response]

Now walk to [Point to C and name an object], turn around and walk past me to [Point to D and name an object] and then return to me." [Wait for response]



SCORE	INDEPENDENCE	SAFETY	ADEQUACY	
			PROCESS	QUALITY
3	No assists given for task initiation, continuation, or completion	Safe practices were observed	Subtasks performed with precision & economy of effort & action	Optimal (performance matches the quality standards listed in each subtask)
2	No Level 7-9 assists given, but occasional Level 1-6 assists given	Minor risks were evident but no assistance provided	Subtasks generally performed w/ precision & economy of effort & action; occasional lack of efficiency, redundant or extraneous action; no missing steps	Acceptable (Performance, for the most part, matches or nearly matches the quality standards listed in each subtask)
1	No Level 9 assists given; or occasional Level 7 or 8 assists given; or continuous Level 1-6 assists given	Risks to safety were observed and assistance given to prevent potential harm	Subtasks generally performed w/ lack of precision and/or economy of effort & action; consistent extraneous or redundant actions; steps may be missing	Marginal (Performance, for the most part, does not match the quality standards listed in each subtask)
0	Level 9 assists given; or continuous Level 7 or 8 assists given; or unable to initiate, continue, or complete subtask or task	Risks to safety of such severity were observed that task was stopped or taken over by assessor to prevent harm	Subtasks are consistently performed w/ lack of precision and/or economy of effort & action so that task progress is unattainable	Unacceptable (Performance does not match the quality standards listed in each subtask, perhaps with few exceptions)

Task # C20: FM: Indoor Walking		INDEPENDENCE DATA											SAFETY DATA	ADEQUACY DATA	
Assistive Technology Devices (ATDs) used during task: 1. 2. 3. Total # of ATDs used: _____		No Assistance	Verbal Supportive (Encouragement)	Verbal Non-Directive	Verbal Directive	Gestures	Task or Environment Rearrangement	Demonstration	Physical Guidance	Physical Support	Total Assist	INDEPENDENCE subtask scores	Unsafe Observations	PROCESS: Imprecision, lack of economy, missing steps	QUALITY: Standards not met / improvement needed
Assist level →		0	1	2	3	4	5	6	7	8	9				
Subtasks	Subtask Criteria														
1 A to B and return	<u>Walks across area, turns, &amp; walks back</u> & <u>maintains balance</u> (no loss of balance; no reliance on furniture or walls for stabilization; no bumping into/stumbling over furniture)														
2 A to C And return	<u>Walks across area, turns, &amp; walks back</u> & <u>maintains balance</u> (no loss of balance; no reliance on furniture or walls for stabilization; no bumping into/stumbling over furniture)														
3 A to D and return	<u>Walks across area, turns, &amp; walks back</u> & <u>maintains balance</u> (no loss of balance; no reliance on furniture or walls for stabilization; no bumping into/stumbling over furniture)														

ADEQUACY  
SCORE

↑

SAFETY  
SCORE

↑

INDEPENDENCE  
MEAN SCORE

↑

SUMMARY SCORES

## Task # C21: IADL-C: Home Safety

### CLINIC CONDITIONS: Clinic apartment and

1. A lightweight woven scatter rug rolled up on one side in front of kitchen sink. [Client should not observe placement of rung]
2. Medium-sized knife placed with blade side up in silverware caddy of dish drainer by the sink
3. The following items placed on a kitchen cupboard that is used for food storage
  - 1 bottle of cooking oil
  - 1 bottle of furniture oil that is the same size as the cooking oil bottle with a label that has similar colors and type size
4. Hand held magnifier on counter
5. Client standing, in turn, in front of each of the above displays

### CLINIC INSTRUCTIONS:

"I am going to show you 3 situations often found in the home. For each situation, I want you to tell me the hazard or problem that it presents and what you would do to correct it."

Ct facing the rolled up scatter rug

"Here is the first situation. [Sweep hand over general area above the rug]. Do you see anything that is a problem? [Wait for response] How would you correct it?" [Wait for a response]

Ct facing the knife and dish drainer

"Here is the second situation. Do you see anything that is a problem? [Wait for response] How would you correct it?" [Wait for a response]

Ct facing the stored items

"Here is the third situation. What if this is the way these items were stored, day after day? Do you see anything that is a problem? [Wait for response] How would you correct it?" [Wait for a response]

SCORE	INDEPENDENCE	SAFETY	ADEQUACY	
			PROCESS	QUALITY
3	No assists given for task initiation, continuation, or completion	Safe practices were observed	Subtasks performed with precision & economy of effort & action	Optimal (performance matches the quality standards listed in each subtask)
2	No Level 7-9 assists given, but occasional Level 1-6 assists given	Minor risks were evident but no assistance provided	Subtasks generally performed w/ precision & economy of effort & action; occasional lack of efficiency, redundant or extraneous action; no missing steps	Acceptable (Performance, for the most part, matches or nearly matches the quality standards listed in each subtask)
1	No Level 9 assists given; or occasional Level 7 or 8 assists given; or continuous Level 1-6 assists given	Risks to safety were observed and assistance given to prevent potential harm	Subtasks generally performed w/ lack of precision and/or economy of effort & action; consistent extraneous or redundant actions; steps may be missing	Marginal (Performance, for the most part, does not match the quality standards listed in each subtask)
0	Level 9 assists given; or continuous Level 7 or 8 assists given; or unable to initiate, continue, or complete subtask or task	Risks to safety of such severity were observed that task was stopped or taken over by assessor to prevent harm	Subtasks are consistently performed w/ lack of precision and/or economy of effort & action so that task progress is unattainable	Unacceptable (Performance does not match the quality standards listed in each subtask, perhaps with few exceptions)

Task # C21: IADL-C: Home Safety		INDEPENDENCE DATA											SAFETY DATA	ADEQUACY DATA	
Assistive Technology Devices (ATDs) used during task: 1. 2. 3. Total # of ATDs used: _____		No Assistance	Verbal Supportive (Encouragement)	Verbal Non-Directive	Verbal Directive	Gestures	Task or Environment Rearrangement	Demonstration	Physical Guidance	Physical Support	Total Assist	INDEPENDENCE subtask scores	Unsafe Observations	PROCESS: Imprecision, lack of economy, missing steps	QUALITY: Standards not met / improvement needed
Assist level →		0	1	2	3	4	5	6	7	8	9				
Subtasks	Subtask Criteria														
1 rug	<u>Identifies correctly the hazard to tripping</u> (Clinic=one could trip on rolled rug)														
2 rung	<u>Identifies way to correct the tripping hazard</u> that is <u>acceptable</u> (Clinic=take up rug, use stiff rug with rubber backing)														
3 knife	<u>Identifies correctly the sharps hazard</u> (Clinic=knife blade up)														
4 knife	<u>Identifies way to correct the sharps hazard</u> that is <u>acceptable</u> (Clinic=store knife with blade down or put into drawer immediately after washing and drying)														
5 oils	<u>Identifies correctly the storage problem</u> (Clinic=furniture polish could accidentally be used instead of cooking oil, potential poisoning)														
6 oils	<u>Identifies way to correct the storage problem</u> that is <u>acceptable</u> (Clinic=remove furniture polish from kitchen cupboard and store under sink, in bathroom, or hallway cupboard)														

SUMMARY SCORES	
<div style="border: 1px solid black; width: 50px; height: 40px; margin: 0 auto;"></div> INDEPENDENCE MEAN SCORE	<div style="border: 1px solid black; width: 50px; height: 40px; margin: 0 auto;"></div> SAFETY SCORE
<div style="border: 1px solid black; width: 50px; height: 40px; margin: 0 auto;"></div> ADEQUACY SCORE	

## Task # C22: IADL-C: Playing Bingo

### CLINIC CONDITIONS: Table and

1. BINGO card which, using the taped BINGO text, will result in a "win" on the diagonal (card A) or horizontal (B) (Note: after the winning number is called, there are 2 additional numbers on the audiotape)
2. Highlighter pen
3. Hand held magnifier
4. Audiotape recorder/playback equipment with good tone
5. Audiotape with voice reading BINGO numbers at about 10 second intervals
6. Items 2-4 arranged left to right in front of Client on table
7. Client seated at table

### CLINIC INSTRUCTIONS:

"Now for the next task we are going to play a game of BINGO. Here is a BINGO card for you [Hand Client card C] and one for me [card D]. Here is a marker [Point]. Remember that you can win with 5 numbers going down [Point], across [Point], on the diagonal [Point], or in the 4 corners [Point]. The first one to call out BINGO wins. Do you know what you are to do?"

[Turn on audiotape recorder / playback equipment]

[Wait for response]

SCORE	INDEPENDENCE	SAFETY	ADEQUACY	
			PROCESS	QUALITY
3	No assists given for task initiation, continuation, or completion	Safe practices were observed	Subtasks performed with precision & economy of effort & action	Optimal (performance matches the quality standards listed in each subtask)
2	No Level 7-9 assists given, but occasional Level 1-6 assists given	Minor risks were evident but no assistance provided	Subtasks generally performed w/ precision & economy of effort & action; occasional lack of efficiency, redundant or extraneous action; no missing steps	Acceptable (Performance, for the most part, matches or nearly matches the quality standards listed in each subtask)
1	No Level 9 assists given; or occasional Level 7 or 8 assists given; or continuous Level 1-6 assists given	Risks to safety were observed and assistance given to prevent potential harm	Subtasks generally performed w/ lack of precision and/or economy of effort & action; consistent extraneous or redundant actions; steps may be missing	Marginal (Performance, for the most part, does not match the quality standards listed in each subtask)
0	Level 9 assists given; or continuous Level 7 or 8 assists given; or unable to initiate, continue, or complete subtask or task	Risks to safety of such severity were observed that task was stopped or taken over by assessor to prevent harm	Subtasks are consistently performed w/ lack of precision and/or economy of effort & action so that task progress is unattainable	Unacceptable (Performance does not match the quality standards listed in each subtask, perhaps with few exceptions)



Task # C22: IADL-C: Playing Bingo		INDEPENDENCE DATA											SAFETY DATA	ADEQUACY DATA	
Assistive Technology Devices (ATDs) used during task: 1. 2. 3. Total # of ATDs used: _____		No Assistance	Verbal Supportive (Encouragement)	Verbal Non-Directive	Verbal Directive	Gestures	Task or Environment Rearrangement	Demonstration	Physical Guidance	Physical Support	Total Assist	INDEPENDENCE subtask scores	Unsafe Observations	<u>PROCESS</u> : Imprecision, lack of economy, missing steps <u>QUALITY</u> : Standards not met / improvement needed	
		0	1	2	3	4	5	6	7	8	9				
Assist level →															
Subtasks	Subtask Criteria														
1	<u>Marks numbers correctly</u> (no numbers marked that have not been called; no numbers unmarked that have been called)														
2	<u>Calls "BINGO" promptly</u> (immediately after B12 is called)														

SUMMARY SCORES	
<div> <div>INDEPENDENCE MEAN SCORE</div> <div>↑</div> <div></div> </div>	<div> <div>SAFETY SCORE</div> <div>↑</div> <div></div> </div>
<div> <div>ADEQUACY SCORE</div> <div>↑</div> <div></div> </div>	

**Tasks # C23, # C24, # C25, # C26: IADL-C: Oven Use, Stovetop Use, Use of Sharp Utensils (Meal Preparation); IADL-P: Clean up after Meal Preparation (Light Housework)**

**CLINIC CONDITIONS:** Kitchen area and

1. Electric or gas stove with oven
2. Sink with dish soap, sponge or dishrag, paper towels, and kitchen towel near sink
3. Electric can opener on counter (plugged in) and hand held can opener next to it
4. Long ring timer on counter next to can openers, pen and tablet next to timer
5. Cutting board on counter
6. Apple and pint of milk placed in refrigerator, within easy view when door is opened
7. Cookie sheet on kitchen counter nearest stove, with items 8-13 stacked on it
8. 1 quart sauce pan with the following items inside: 1 wooden spoon, 1 ladle, and 1 can of soup requiring only the addition of water/milk\*
9. 1 quart mixing bowl with handle and lip for pouring with the following inside: 1 wooden spoon, 1 spatula, a 1 cup clear plastic graduated measuring cup, and 1 package muffin mix requiring only the addition of milk or water\*
10. Muffin tin for 6 muffins with cooking spray next to muffin tin
11. 2 oven mitts
12. 3 different sizes of knives, including 1 paring knife
13. 12 inch sheet of tinfoil (for storage)
14. Hand held magnifier next to cookie sheet
15. Dinner plate, dessert plate, and 2 soup bowls in a stack next to the cookie sheet
16. Assessor holding 3 x 5 inch menu card with the following directions: "Muffins made with milk/water, soup made with water, apple cut into 8 sections with skin and core removed"
17. Client facing the kitchen counter

\*Flavor and use of water/milk based on Client preference and type of soup/muffins, as well as religious restrictions (e.g., Kosher)

**CLINIC INSTRUCTIONS:**

"Next, you are going to prepare a light meal consisting of muffins, soup, and fruit. You are also to clean up whatever you use."

"Before you start, let me review with you how the stovetop and oven are operated."

[Show Client how burner knobs turn on and off and how they are coded to each burner, ask Client to identify the burner that matches the knob to the far left. Then review how the oven knob works and how to turn it on and off. Ask Client to set the oven knob to 300° and then turn the oven off].

"The muffins and the soup that you selected to prepare are on the kitchen counter along with the equipment that you need to prepare them [Point to the cookie sheet which is placed on the counter near the stove], except for the apple and milk\* which are in the refrigerator." [Point to the refrigerator]

[Hand Client menu card] "When you fix the muffins, you are to use the oven [NOTE: Not the microwave]. The muffins are to be made with water/milk and they take the longest amount of time to make. The soup is to be made with water/milk. The apple is to be cut with a knife into 8 pieces and the peel and core are to be removed. Plan the meal so that all items will be ready to eat at about the same time. When the food is ready, use these dishes to put it on the table." [Point to dishes]

"Clean up as you go or after you are done. When the dishes are washed they are to be put in the dish drainer to air dry. The garbage can is right there." [Point to garbage can]

"Do you know what you are to do? Do you have everything that you need? What are you going to cook first? [Wait for response] [If response is other than "muffins", say] "Remember, the muffins take the longest amount of time because the oven has to warm up first." [If above assist is given, document a verbal non-directive for subtask 1]. [Wait for response]

SCORE	INDEPENDENCE	SAFETY	ADEQUACY	
			PROCESS	QUALITY
3	No assists given for task initiation, continuation, or completion	Safe practices were observed	Subtasks performed with precision & economy of effort & action	Optimal (performance matches the quality standards listed in each subtask)
2	No Level 7-9 assists given, but occasional Level 1-6 assists given	Minor risks were evident but no assistance provided	Subtasks generally performed w/ precision & economy of effort & action; occasional lack of efficiency, redundant or extraneous action; no missing steps	Acceptable (Performance, for the most part, matches or nearly matches the quality standards listed in each subtask)
1	No Level 9 assists given; or occasional Level 7 or 8 assists given; or continuous Level 1-6 assists given	Risks to safety were observed and assistance given to prevent potential harm	Subtasks generally performed w/ lack of precision and/or economy of effort & action; consistent extraneous or redundant actions; steps may be missing	Marginal (Performance, for the most part, does not match the quality standards listed in each subtask)
0	Level 9 assists given; or continuous Level 7 or 8 assists given; or unable to initiate, continue, or complete subtask or task	Risks to safety of such severity were observed that task was stopped or taken over by assessor to prevent harm	Subtasks are consistently performed w/ lack of precision and/or economy of effort & action so that task progress is unattainable	Unacceptable (Performance does not match the quality standards listed in each subtask, perhaps with few exceptions)

Task # C23: IADL-C: Oven Use (Meal Preparation)		INDEPENDENCE DATA											SAFETY DATA	ADEQUACY DATA	
Assistive Technology Devices (ATDs) used during task: 1. 2. 3. Total # of ATDs used: _____		No Assistance	Verbal Supportive (Encouragement)	Verbal Non-Directive	Verbal Directive	Gestures	Task or Environment Rearrangement	Demonstration	Physical Guidance	Physical Support	Total Assist	INDEPENDENCE subtask scores	Unsafe Observations	PROCESS: Imprecision, lack of economy, missing steps	QUALITY: Standards not met / improvement needed
Assist level →		0	1	2	3	4	5	6	7	8	9				
Subtasks	Subtask Criteria														
1	<u>Reports correctly</u> that <u>muffins must be started first</u>														
2	<u>Sets oven temperature control correctly</u> (as designated on instructions)														
3	<u>Measures liquid correctly</u> (amount listed on the package)														
4	<u>Prepares muffins for oven correctly</u> (stirs until blended; greases tin or puts in paper muffin cups; fills muffin cups about 2/3 full)														
5	<u>Places food in oven correctly</u> (uses mitt; if tremor is evident or if placing between two oven racks; does not allow skin to touch racks or inside of oven door)														
6	<u>Removes food from oven correctly</u> (uses mitt/holder; does not allow skin to touch racks or inside of oven door; removes + / - 5 minutes of shortest or longest suggested baking time; no indication of inadequately heated/ cooked food or burned food)														
7	<u>Turns off oven promptly</u> (before or immediately after removal of food)														
8	<u>Removes muffins from tin onto plate correctly</u> (uses mitt/holder and knife if tin still warm; lets tin cool and then removes muffins onto plate)														
9	<u>Transports muffins to table correctly</u> (uses cart if weakness, tremor or instability present; does not spill on floor)														

SUMMARY SCORES	
INDEPENDENCE MEAN SCORE	<input type="text"/>
SAFETY SCORE	<input type="text"/>
ADEQUACY SCORE	<input type="text"/>

Tasks # C23, # C24, # C25, # C26: IADL-C: Oven Use, Stovetop Use, Use of Sharp Utensils (Meal Preparation); IADL-P: Clean up after Meal Preparation (Light Housework)

## Stovetop Use

SCORE	INDEPENDENCE	SAFETY	ADEQUACY	
			<u>PROCESS</u>	<u>QUALITY</u>
3	No assists given for task initiation, continuation, or completion	Safe practices were observed	Subtasks performed with precision & economy of effort & action	Optimal (performance matches the quality standards listed in each subtask)
2	No Level 7-9 assists given, but occasional Level 1-6 assists given	Minor risks were evident but no assistance provided	Subtasks generally performed w/ precision & economy of effort & action; occasional lack of efficiency, redundant or extraneous action; no missing steps	Acceptable (Performance, for the most part, matches or nearly matches the quality standards listed in each subtask)
1	No Level 9 assists given; or occasional Level 7 or 8 assists given; or continuous Level 1-6 assists given	Risks to safety were observed and assistance given to prevent potential harm	Subtasks generally performed w/ lack of precision and/or economy of effort & action; consistent extraneous or redundant actions; steps may be missing	Marginal (Performance, for the most part, does not match the quality standards listed in each subtask)
0	Level 9 assists given; or continuous Level 7 or 8 assists given; or unable to initiate, continue, or complete subtask or task	Risks to safety of such severity were observed that task was stopped or taken over by assessor to prevent harm	Subtasks are consistently performed w/ lack of precision and/or economy of effort & action so that task progress is unattainable	Unacceptable (Performance does not match the quality standards listed in each subtask, perhaps with few exceptions)

Task # C24: IADL-C: Stovetop Use (Meal Preparation)		INDEPENDENCE DATA										SAFETY DATA	ADEQUACY DATA		
Assistive Technology Devices (ATDs) used during task: 1. 2. 3. Total # of ATDs used: _____		No Assistance	Verbal Supportive (Encouragement)	Verbal Non-Directive	Verbal Directive	Gestures	Task or Environment Rearrangement	Demonstration	Physical Guidance	Physical Support	Total Assist	INDEPENDENCE subtask scores	Unsafe Observations	PROCESS: Imprecision, lack of economy, missing steps	QUALITY: Standards not met / improvement needed
Assist level →		0	1	2	3	4	5	6	7	8	9				
Subtasks	Subtask Criteria														
1	<u>Opens soup can correctly</u> (cut is even, entire top is off or <1/2" is retained in one place)														
2	<u>Removes/handles soup can lid correctly</u> (lifts lid with knife; punches lid into can; does not cut finger)														
3	<u>Pours/spoons soup into pan without spilling</u> (no soup on Ct, counter, or floor)														
4	<u>Adds liquid correctly</u> (adds 1 can of water/milk; does not spill on self, floor)														
5	<u>Places pan on correct stove burner</u> (burner closest to pan size)														
6	<u>Turns burner on correctly</u> (manipulates knob for burner that soup is on or is placed onto later; sets control on medium to high)														
7	<u>Monitors soup adequately</u> (stirs; alters heat as necessary, soup does not stick on pan, checks to make sure soup temperature is hot rather than lukewarm to touch or taste or that soup boils/bubbles)														
8	<u>Removes pan from burner</u> when soup is still <u>hot</u> (steam can be seen rising from pan; checks to make sure soup temperature is hot rather than lukewarm to touch or taste)														
9	<u>Turns burner off promptly</u> (+/- 1 minute of removing soup from burner)														
10	<u>Transports &amp; pours soup into bowls correctly</u> (uses mitt under pan or slides pan across counter for stability if weakness or tremor present; does not spill on floor; only minor drips on counter)														
11	<u>Transports bowls to table correctly</u> (uses mitt under bowl or uses cart if weakness, tremors, or instability present; uses bowl rim to carry; does not spill on floor)														

SUMMARY SCORES

INDEPENDENCE  
MEAN SCORE

↑

SAFETY  
SCORE

↑

ADEQUACY  
SCORE

↑

Tasks # C23, # C24, # C25, # C26: IADL-C: Oven Use, Stovetop Use, Use of Sharp Utensils (Meal Preparation); IADL-P: Clean up after Meal Preparation (Light Housework)

## Use of Sharp Utensils

SCORE	INDEPENDENCE	SAFETY	ADEQUACY	
			<u>PROCESS</u>	<u>QUALITY</u>
3	No assists given for task initiation, continuation, or completion	Safe practices were observed	Subtasks performed with precision & economy of effort & action	Optimal (performance matches the quality standards listed in each subtask)
2	No Level 7-9 assists given, but occasional Level 1-6 assists given	Minor risks were evident but no assistance provided	Subtasks generally performed w/ precision & economy of effort & action; occasional lack of efficiency, redundant or extraneous action; no missing steps	Acceptable (Performance, for the most part, matches or nearly matches the quality standards listed in each subtask)
1	No Level 9 assists given; or occasional Level 7 or 8 assists given; or continuous Level 1-6 assists given	Risks to safety were observed and assistance given to prevent potential harm	Subtasks generally performed w/ lack of precision and/or economy of effort & action; consistent extraneous or redundant actions; steps may be missing	Marginal (Performance, for the most part, does not match the quality standards listed in each subtask)
0	Level 9 assists given; or continuous Level 7 or 8 assists given; or unable to initiate, continue, or complete subtask or task	Risks to safety of such severity were observed that task was stopped or taken over by assessor to prevent harm	Subtasks are consistently performed w/ lack of precision and/or economy of effort & action so that task progress is unattainable	Unacceptable (Performance does not match the quality standards listed in each subtask, perhaps with few exceptions)

Task # C25: IADL-C: Use of Sharp Utensils (Meal Preparation)		INDEPENDENCE DATA										SAFETY DATA	ADEQUACY DATA		
Assistive Technology Devices (ATDs) used during task: 1. 2. 3. Total # of ATDs used: _____		No Assistance	Verbal Supportive (Encouragement)	Verbal Non-Directive	Verbal Directive	Gestures	Task or Environment Rearrangement	Demonstration	Physical Guidance	Physical Support	Total Assist	INDEPENDENCE subtask scores	Unsafe Observations	PROCESS: Imprecision, lack of economy, missing steps	QUALITY: Standards not met / improvement needed
Assist level →		0	1	2	3	4	5	6	7	8	9				
Subtasks	Subtask Criteria														
1	<u>Obtains correct fruit</u> from refrigerator (Apple)														
2	<u>Selects appropriate knife</u> (selects paring knife or other small knife)														
3	<u>Cuts fruit into 8 parts, removes seeds, &amp; removes peel correctly</u> (8 pieces; seeds removed; peel removed)														
4	<u>Transports plate with fruit to table correctly</u> (does not carry knife along; uses cart if weakness, tremor, or instability present; does not spill on floor)														

SUMMARY SCORES	
INDEPENDENCE MEAN SCORE	<input type="text"/>
SAFETY SCORE	<input type="text"/>
ADEQUACY SCORE	<input type="text"/>

Tasks # C23, # C24, # C25, # C26: IADL-C: Oven Use, Stovetop Use, Use of Sharp Utensils (Meal Preparation); IADL-P: Cleanup after Meal Preparation (Light Housework)

## Clean Up after Meal Preparation

SCORE	INDEPENDENCE	SAFETY	ADEQUACY	
			<u>PROCESS</u>	<u>QUALITY</u>
3	No assists given for task initiation, continuation, or completion	Safe practices were observed	Subtasks performed with precision & economy of effort & action	Optimal (performance matches the quality standards listed in each subtask)
2	No Level 7-9 assists given, but occasional Level 1-6 assists given	Minor risks were evident but no assistance provided	Subtasks generally performed w/ precision & economy of effort & action; occasional lack of efficiency, redundant or extraneous action; no missing steps	Acceptable (Performance, for the most part, matches or nearly matches the quality standards listed in each subtask)
1	No Level 9 assists given; or occasional Level 7 or 8 assists given; or continuous Level 1-6 assists given	Risks to safety were observed and assistance given to prevent potential harm	Subtasks generally performed w/ lack of precision and/or economy of effort & action; consistent extraneous or redundant actions; steps may be missing	Marginal (Performance, for the most part, does not match the quality standards listed in each subtask)
0	Level 9 assists given; or continuous Level 7 or 8 assists given; or unable to initiate, continue, or complete subtask or task	Risks to safety of such severity were observed that task was stopped or taken over by assessor to prevent harm	Subtasks are consistently performed w/ lack of precision and/or economy of effort & action so that task progress is unattainable	Unacceptable (Performance does not match the quality standards listed in each subtask, perhaps with few exceptions)



Task # C26: IADL-P: Cleanup after Meal Preparation (Light Housework)		INDEPENDENCE DATA											SAFETY DATA	ADEQUACY DATA	
Assistive Technology Devices (ATDs) used during task: 1. 2. 3. Total # of ATDs used: _____		No Assistance	Verbal Supportive (Encouragement)	Verbal Non-Directive	Verbal Directive	Gestures	Task or Environment Rearrangement	Demonstration	Physical Guidance	Physical Support	Total Assist	INDEPENDENCE subtask scores	Unsafe Observations	PROCESS: Imprecision, lack of economy, missing steps	QUALITY: Standards not met / improvement needed
Assist level →		0	1	2	3	4	5	6	7	8	9				
Subtasks	Subtask Criteria														
1	<u>Collects all dirty dinner/cookware</u> from meal preparation tasks (gathers items from stove, counter, table, etc.)														
2	<u>Prepares water and soap for washing</u> dinner/cookware in sink <u>adequately</u> (suds apparent, water warm or hot to the touch)														
3	<u>Washes</u> dinnerware <u>adequately</u> (no food particles or residue left on dishes)														
4	<u>Rinses dinnerware adequately</u> (no soap bubbles, food particles, or residue apparent with visual inspection)														
5	<u>Places washed/rinsed dishes, pans, &amp; utensils in drainer to air dry correctly</u> (no items left on counter or in sink; no food particles, soap, or residue apparent with visual inspection)														
6	<u>Clears/cleans all work surfaces used</u> (counter, table, stove, sink, floor) <u>adequately</u> (puts leftovers in refrigerator or garbage; does not scrape scraps onto floor; wipes work surfaces so that no food scraps or residue are visible)														

ADEQUACY SCORE

SAFETY SCORE

INDEPENDENCE MEAN SCORE

SUMMARY SCORES