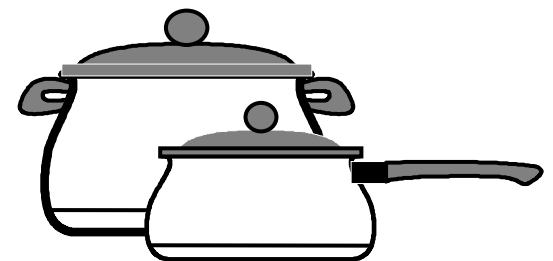


# Performance Assessment of Self-Care Skills (PASS – Home) Version 4.1

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## SCORING VIDEOS





## CLIENT INFORMATION SHEET: PASS HOME (PASS – H)

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

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

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



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

## Task # H1: FM: Bed Mobility

HOME CONDITIONS: Bedroom area and

1. Bed, "as is"
2. Towel available to place on bed
3. Client, positioned in line with the foot of the bed, 2 feet out from the side, facing the bed

### HOME 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 # H1: 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>Low</u> ers self onto bed in a <u>controlled</u> manner (does not “plop” down)	X										3			✓	
2	<u>Adjusts body position</u> so mattress <u>completely</u> supports total body (prone, supine, sidelying)	X										3				
3	<u>Turns self around 180 degrees</u> in a <u>controlled</u> manner (smooth movement, no false starts)	X										3				
4	<u>Raises self to sitting position</u> on edge of bed in a <u>controlled</u> manner (does not “ratchet” self upright)	X										3				
5	<u>Raises self off bed</u> in a <u>controlled</u> manner (does not “rock” to gain momentum)	X										3			✓	
6	<u>Comes to stand &amp; achieves &amp; maintains balance</u> (does not pull self up, does not hold onto bed or other objects)	X										3	✓		✓	

#1 Plop

#5 Rock

#6 Held onto bedside table (not solid/safe)

1

ADEQUACY  
SCORE

↑

2

SAFETY  
SCORE

↑

3

INDEPENDENCE  
MEAN SCORE

## Task # H2: FM: Stair Use

### HOME CONDITIONS:

1. Flight of stairs
2. Client, with shoes on, positioned at the bottom of the stairs
3. Safety belt available if needed

### HOME INSTRUCTIONS:

[NOTE: Based on the home arrangement, use the directions in the order that is appropriate. Follow the Client up the stairs using the safety position; precede the client down the stairs using the safety position. If Client shows any signs of weakness or instability, use a safety belt].

“Show me how you walk up the stairs, and when you reach the top, turn around and face the stairs and wait for me. Do you know what you are to do?” [Wait for response]

“Show me how you walk down the stairs, and stop when you reach the landing. 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 # H2: 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	Ascends stairs 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	✓	✓ ✓
2	Positions self on upper landing appropriately (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)	X										3		
3	Descends stairs 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)	X										3	✓	✓ ✓

- #1 Catches foot (safety)  
 Doesn't use reciprocal gait (quality)  
 Imprecision in raising foot to adequately clear step (safety/process)  
 #3 Catches left heel on 2<sup>nd</sup> step when descending (safety/process)  
 2 feet/step – no reciprocal gait (quality)

SUMMARY SCORES	
2.6	INDEPENDENCE MEAN SCORE ↑
1	SAFETY SCORE ↑
1	ADEQUACY SCORE ↑

### Task # H3: FM: Toilet Mobility and Management

HOME CONDITIONS: Bathroom area and

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

#### HOME 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 # H3: 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 →															
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)	X										3			
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)	X										3			
4	<u>Lowers self onto toilet</u> in a <u>controlled</u> manner (does not “plop” down; buttocks are centered on & touching seat)	X										3			✓
5	<u>Reaches for &amp; gathers</u> (grasps and folds) <u>toilet paper</u> , & <u>maintains balance</u> (does not fall forward or sideways)			✓	✓							2		✓	
6	<u>Places toilet paper</u> into toilet & <u>maintains balance</u> (does not fall forward or sideways)	X										3			
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)	X										3	✓	✓	✓
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)	X										3			

*Note: Preparatory actions (i.e., putting on shorts) are not included in subtask criteria and therefore are not rated.*

*#1 NA – already in bathroom; holds onto toilet, plops, holds onto toilet paper holder & rocks – not counted as it is before task starts; #4 plop (quality); #5 do you remember (level 2 assist/process), repeats instructions (level 3 assist/process); #7 rocks (quality), pushes off toilet seat (quality), toilet paper holder (safety/quality), inefficiency/lack of economy of effort (process)*

SUMMARY SCORES	
2.8	INDEPENDENCE MEAN SCORE ↑
2	
1	SAFETY SCORE ↑
	ADEQUACY SCORE ↑

#### Task # H4: BADL: Oral Hygiene (Teeth only, Dentures Only, Dentures & Teeth, No Teeth or Dentures)

HOME CONDITIONS: Bathroom area and

1. Client's own oral hygiene materials\*
2. Client positioned in front of bathroom sink

\*Have denture tablets available as a replacement in case Client is hesitant to use own tablets for the assessment

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

#### HOME 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?"]

#### HOME SPECIFIC INSTRUCTIONS:

Teeth Only. "Show me how you care for your teeth. 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. If you soak your dentures, just let them soak for a few minutes. 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. If you soak your dentures, just let them soak for a few minutes. 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. 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)

*#3 Brush side (level 3 assist), brush back (level 3 assist), not thorough/impression/missing step (quality/process)  
Are you done? – doesn't count as anything*

Task # H4: 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)	X										3			
2 Teeth	<u>Manipulates toothpaste container</u> to obtain adequate paste on brush (paste can be visually observed on brush)	X										3			
3 Teeth	<u>Brushes all</u> parts of mouth where <u>teeth</u> are present <u>thoroughly</u> (no particles visible)			√√								2		√	√
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)	X										3			
5 Dent	<u>Manages all</u> 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)	X										3			
13 Water	<u>Turns off water faucet completely</u> (water does not run in steady stream)	X										3			

SUMMARY SCORES	
INDEPENDENCE MEAN SCORE	2.8
SAFETY SCORE	3
ADEQUACY SCORE	2

## Task # H5: FM: Bathtub and Shower Mobility

HOME CONDITIONS: Bathroom area\* and

1. Bathtub and/or shower area, "as is"
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**

### HOME 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 # H7 – Dressing].

When the shower is in the bathtub

"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]

*Plops when sitting, holds onto back of toilet – no criteria – so not addressed*

*#4 holds wall (quality), catches L foot (safety/quality), watch your foot (level 3 assist, lack of economy/inefficiency (process))*

*#5 plops (quality)*

*#6 holds onto tub/shower wall (quality)*

*#7 rocks (quality); holds onto shower control (safety/quality/process)*

*#8 don't hold onto curtain (level 3 assist, safety/process); support with hand – verbal directive included – hold onto my hand (level 8 assist, safety); remember to pick up your foot (level 3 assist); curtain and support (quality)*

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 # H5: FM: Bathtub and Shower Mobility		INDEPENDENCE DATA											SAFETY DATA	ADEQUACY DATA	
Assistive Technology Devices (ATDs) used during task: 1. <i>Dressing Stick</i> 2. <i>Bath Chair</i> 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)				✓							2	✓	✓	✓
5 Tub	<u>Lowers self to a seated position</u> on tub bottom in a <u>controlled</u> manner (does not "plop" down)	X										3			✓
6 Tub	<u>Sits on tub bottom &amp; maintains balance</u> (does not hold onto tub sides or soap dish)	X										3			✓
7 Tub	<u>Raises self from tub bottom</u> in a <u>controlled</u> manner (does not "rock" to gain momentum)	X										3	✓	✓	✓
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)				✓ ✓					✓		1	✓	✓	✓
9 Dress H7	<u>Removes shoes efficiently</u> (does not struggle to pull or push shoes off) and <u>completely</u> (toes out of shoes) [ <i>Copy ratings to Task # H7 - Dressing</i> ]	X										3			
10 Dress H7	<u>Doffs hosiery efficiently</u> (does not struggle to get hosiery over heel or toes) and <u>completely</u> (totally off toes) [ <i>Copy ratings to Task # H7 - Dressing</i> ]	X										3			

**SUMMARY SCORES**

**2.4**

INDEPENDENCE  
MEAN SCORE

↑

**1**

SAFETY  
SCORE

↑

**0**

ADEQUACY  
SCORE

↑

### Task # H6: BADL: Trimming Toenails

HOME CONDITIONS: Bathroom area, or usual setting for task performance, and

1. Usual tools for task performance
2. Sitting or standing position based on client's preference
3. Client with bare feet

\*Recommend to 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)**

#### HOME INSTRUCTIONS:

"Next I want you to demonstrate how you trim your toenails. Please gather up your usual tools and sit or stand where you usually do when you trim your nails." [Wait for response]

"Now, 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 # H6: BADL: Trimming Toenails		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>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)										√	0				
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)										√	0				
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)										√	0				
4	<u>Trims nails</u> (2 on each foot) <u>adequately</u> (trims off entire edge of nail, cut is reasonably smooth and even)										√	0				

ADEQUACY  
SCORE

0

↑

SAFETY  
SCORE

0

↑

INDEPENDENCE  
MEAN SCORE

0

↑

## Task #H7: BADL: Dressing

HOME CONDITIONS: Bedroom area, and

1. Closet or dresser

NOTE: If Client is wearing an upper extremity garment that meets these specifications, he/she may doff and don it

NOTE: If Client is wearing a lower extremity garment, such as underpants, shorts, or slacks, he/she may doff and don it

2. Elastic-waist shorts (extra-large size) available if needed
3. Client's own shoes and socks
4. Client fully dressed except for shoes and socks

### HOME INSTRUCTIONS:

"The next task involves dressing. I need to see how you put on and remove upper body and lower body clothing. I need you to get [NOTE: list as appropriate, based on what client is wearing] a pair of slacks, shorts, or pants, and a cardigan sweater or top with front-opening buttons.] If you don't have a pair of slacks I have a pair of shorts you can use." [Wait for response, and if affirmative, hand to Client]

"First, put on the pants [Point to pants/shorts on bed]. Next, put on and button this top [Point to sweater/jacket on bed]. 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 Ct chooses to use assessment clothing, give 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	
			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 # H7: BADL: Dressing		INDEPENDENCE DATA										SAFETY DATA	ADEQUACY DATA		
Assistive Technology Devices (ATDs) used during task:  1. <i>Dressing Stick</i>  2. <i>Sock Aid</i>  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 →															
Subtasks	Subtask Criteria														
1 <i>From # H5</i>	<u>Removes shoes efficiently</u> (does not struggle to pull or push shoes off) & <u>completely</u> (toes out of shoes)	X										3			
2 <i>From # H5</i>	<u>Doffs hosiery efficiently</u> (does not struggle to get hosiery over heel or toes) & <u>completely</u> (totally off toes)	X										3			
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)			√ √								2		√	√
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]			√								2		√	
5	<u>Buttons upper extremity garment correctly</u> (fastens all buttons in the correct holes; does not fumble any button more than 2x)	X										3		√	
6	<u>Doffs upper extremity garment correctly</u> [uses only hands (no teeth); takes off only assessment clothing]	X										3		√	
7	<u>Doffs lower extremity garment correctly</u> (takes off only assessment clothing) & <u>maintains balance</u> (does not have to “catch” self)	X										3			
8	<u>Dons hosiery efficiently</u> (does not struggle) & <u>correctly</u> (hosiery has the outside out; heel of hosiery on heel of foot)	X										3			
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)	X										3			

#3 check again (level 2 assist), are they on the right way (level 2 assist), client says do you want me to fix it (legitimate question) – therapist says yes (doesn't count as an assist) (process/quality); #4 anything else (level 2 assist), then says yes – just confirming/response to question; slow performance (process); #5/6 struggles buttoning/facial expression/imprecision (process). Plops on bed during task performance – no criteria.

## SUMMARY SCORES

2.7

INDEPENDENCE  
MEAN SCORE ↑

3

SAFETY  
SCORE ↑

1

ADEQUACY  
SCORE ↑

## Task # H8: IADL-C: Shopping (Money Management)

### HOME CONDITIONS: Table and

- 8 unopened boxes, with local prices marked on the top of each box as follows:
  - 1 (10 oz) box Brand B Chopped Broccoli
  - 1 (10 oz) box Brand B Green Beans (French Style)
  - 1 (10 oz) box Brand A Green Peas
  - 1 box Brand B Chopped Spinach
  - 1 (10 oz) box Brand B Petite Green Peas
  - 1 (10 oz) box Brand A Chopped Broccoli
  - 1 (10 oz) box Brand B Green Beans (Cut)
  - 1 (10 oz) box Brand C Broccoli Spears in Butter Sauce
- Envelope with 5 coupons; one coupon matches one of the frozen items (no other matches); matching coupon is 3<sup>rd</sup> coupon in envelope
- 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
- Typed grocery list that includes:
  - 1 box Brand A Chopped Broccoli (coupon item)
  - 1 box Brand B Chopped Spinach
  - 1 box Brand A Green Peas
  - 1 box Brand B Green Beans
- Grocery receipts (can be printed front to back); one receipt includes "Brand B Green Beans (French Style)" and the other receipt includes "Brand B Green Beans (Cut)".
- Client seated at table with boxes arranged from left to right in the order given in #1 above; the grocery list and wallet are positioned in front of the boxes.

### HOME 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 boxes 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 Brand A Chopped Broccoli, the coupon for 10 ¢, and \$1.00, give the client 1 quarter and 1 dime (35 ¢)...a 10¢ overpayment].

"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 # H8: 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			✓
2	<u>Selects the correct cash</u> for the 4 grocery items (cash given matches the receipt amount)	X										3			
3	<u>Selects the correct coupon</u> for the matching item (sets one coupon aside; gestures to matching item; places coupon on appropriate can)			✓	✓ ✓	✓	✓	✓				1		✓	✓
4	<u>Gives correct coupon &amp; \$1.00</u> to assessor (Brand A Chopped Broccoli coupon)			✓								2		✓	✓
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 (34 cents)			✓	✓ ✓		✓				✓	0		✓	✓

*#1 Are you sure you're correct (VND/quality); #3 please check again (VND/process/quality) – missing step/standard not met, try and match each coupon to the boxes you purchased (VD/process/quality) – missing step/standard not met, spread the boxes out here (points – gesture/missing step/standard not met), let me show you, places boxes (task rearrangement/missing step/standard not met), so match each coupon with the box (VD) – missing step/standard not met, demonstrates – now you try it (missing step/standard not met); #4 do you need \$2 or \$1 to purchase item (VD/quality/process); #5 check again (VND), wrong amount (quality), reach what coupon says (VD/quality/process) – imprecision, how much change should I have given you (VD/quality/process) – imprecision, therapist breaks down task cognitively (task rearrangement/quality), how much is box of broccoli, etc., gave answer (total assist/quality) – imprecision/standard not met.*

SUMMARY SCORES	
INDEPENDENCE MEAN SCORE	1.6
SAFETY SCORE	0
ADEQUACY SCORE	

# **Task # H9: IADL-C: Bill Paying by Check (Money Management)**

## HOME 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. Client seated at a table with good lighting, with items 1 (checks) & 2 (bills with envelopes) stacked in front of client, and item 3 (pen, tablet) available to the right of the stacked checks and bills/envelopes

## HOME 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. Use today's date. [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]. 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	
			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 # H9: IADL-C: Bill Paying by Check (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 →															
Subtasks	Subtask Criteria														
1 Water	<u>Writes the date correctly</u> (date of testing) & <u>legibly</u> (can be interpreted)			√	√√							1		√	√
2 Water	<u>Writes the name of the payee correctly</u> (name of utility company) & <u>legibly</u> (can be interpreted)	X										3			
3 Water	<u>Selects the correct amount to be paid</u> (payment on time; not the late payment amount)	X										3			
4 Water	<u>Writes the bill amount correctly</u> (amount corresponds to that on utility bill) & <u>legibly</u> (can be interpreted)	X										3			
5 Water	<u>Writes the bill amount in numerics correctly</u> (amount corresponds to that on utility bill) & <u>legibly</u> (can be interpreted)	X										3			
6 Water	<u>Writes the signature correctly</u> (writes first and last name) & <u>legibly</u> (can be interpreted)	X										3			
7 Electric	<u>Writes the date correctly</u> (date of testing) & <u>legibly</u> (can be interpreted)	X										3			
8 Electric	<u>Writes the name of the payee correctly</u> (name of utility company) & <u>legibly</u> (can be interpreted)	X										3			
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)	X										3			
10 Electric	<u>Writes the bill amount correctly</u> (amount corresponds to that on utility bill) & <u>legibly</u> (can be interpreted)	X										3			
11 Electric	<u>Writes the bill amount in numerics correctly</u> (amount corresponds to that on utility bill) & <u>legibly</u> (can be interpreted)	X										3			
12 Electric	<u>Writes the signature correctly</u> (writes first and last name) & <u>legibly</u> (can be interpreted)	X										3			

#1 can you check (VND); how can you find correct date (VD); extra check use a new one (VD) – process/quality issues  
 Asks about budget amount – clarification/not an asisst

## SUMMARY SCORES

2.8

INDEPENDENCE  
MEAN SCORE

SAFETY  
SCORE

2

ADEQUACY  
SCORE

# **Task # H10: IADL-C: Checkbook Balancing (Money Management)**

## HOME CONDITIONS: Table and

1. Bills with envelopes and completed checks
2. Ball point pen (black ink), tablet for calculations
3. Reproduction of one page from checkbook ledger with a balance of \$875.95 and check for \$18.23 payable to client (to be handed to client by assessor)
4. Client seated at a table with good lighting, and with items 1, 2 and 3 (bills, envelopes, completed checks, pen, tablet, reproduction of checkbook ledger page, and check payable to Client) on the table

## HOME 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 \$18.23 [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 # H10: 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 →															
Subtasks	Subtask Criteria														
1 Water	<u>Writes water company's check number legibly</u> (can be interpreted) & into <u>appropriate</u> column (item number)	X										3			
2 Water	<u>Writes water company's name legibly</u> (can be interpreted) or acceptable description into <u>appropriate</u> column (transaction description)	X										3			
3 Water	<u>Writes water company's check amount legibly</u> (can be interpreted) & into <u>appropriate</u> column (subtraction/debit)	X										3			
4 Elec.	<u>Writes electric company check number legibly</u> (can be interpreted) into <u>appropriate</u> column (item number)	X										3			
5 Elec.	<u>Writes electric company's name legibly</u> (can be interpreted) or acceptable description into <u>appropriate</u> column (transaction description)	X										3			
6 Elec.	<u>Writes electric company's check amount legibly</u> (can be interpreted) into <u>appropriate</u> column (subtraction/debit)	X										3			
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)			√	√							2		√	
8 Balance	<u>Calculates new balance correctly</u> (original checkbook balance – water – electricity + refund = new balance)			√	√							2		√	√
9 Ledger	<u>Writes the new balance legibly</u> (can be interpreted)	X										3			

#7 anything else (VND); what about refund check (VD) – process (missing step)

#8 check that again (VND); water utility check amount is in the withdrawal column (VD) – economy of effort/multiple attempts – process/quality issues

## SUMMARY SCORES

2.7

INDEPENDENCE  
MEAN SCORE

SAFETY  
SCORE

2

ADEQUACY  
SCORE

# **Task # H11: IADL-C: Mailing Bills (Money Management)**

## HOME CONDITIONS: Table and

1. Bills with envelopes & completed checks
2. Ball point pen (black ink), tablet for calculations
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. Client seated at a table with good lighting, and items 1, 2 and 3 (bills, envelopes, completed checks, pen, tablet, and stamps) available on the table

## HOME 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 # H11: 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 →															
Subtasks	Subtask Criteria														
1 Water Elec.	<u>Tears off return portion of bills correctly</u> (tears/cuts on line; no essential information is missing)	X										3			
2 Water	<u>Inserts correct items into correct envelope</u> (check inserted & bill address visible; window envelope)	X										3			
3 Water	<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)	X										3			
4 Water	<u>Selects first class stamp and secures it correctly</u> (first class stamp on upper right hand corner of envelope)			√	√							2		√	√
5 Water	<u>Seals envelope securely</u> (flap is sealed, does not open)			√	√							2		√	√
6 Elec.	<u>Addresses envelope correctly</u> (addressee, street address, city, state, zip code on body of envelope)	X										3			
7 Elec.	<u>Inserts correct items into envelope</u> (check & return portion of bill)	X										3			
8 Elec.	<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)	X										3			
9 Elec.	<u>Selects first class stamp and secures it correctly</u> (first class stamp on upper right hand corner of envelope)	X										3			
10 Elec.	<u>Seals envelope securely</u> (flap is secure, does not open)	X										3			

#4 anything else (VND), can you put a stamp on it (VD), yes – confirmation, missing step (quality/process)

#5 anything else (VND), seal the envelope (VD), missing step (quality/process)

Client was given assist for first envelope – then self-corrected (#9 stamp/#10 seal)

SUMMARY SCORES	
2.8	INDEPENDENCE MEAN SCORE ↑
	SAFETY SCORE ↑
2	ADEQUACY SCORE ↑

## Task # H12: IADL-P Taking Out Garbage; Key Use (Heavy Housework)

HOME CONDITIONS: Room with a door leading out of the apartment or home, and

1. A plastic garbage sack on floor, containing the Consumer Yellow Pages, soup can, tuna & cat fish cans, muffin mix, & apple, tied so that cans cannot rotate
2. Client standing beside sack, approximately 10 feet from door [inside], holding key to outside door

**\*\*\*before testing Client, make sure that the key the Client intends to use operates the lock, so that you can get back inside**

### HOME INSTRUCTIONS:

"The next task involves carrying out the garbage. First, you need to get your house (apartment) key so that you can let us back into the house (apartment). [When Client returns with the key, ask Client to demonstrate how the lock works allowing you to make sure the correct key is going to be used]. Now, please pick up the garbage sack and carry it out the door. 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 # H12: 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	Picks up sack from floor & maintains balance (does not reach to “catch” self; does not shuffle feet to regain posture)	X										3	✓		✓
2	Lifts sack in a controlled manner (not jerky; sack doesn’t swing out)	X										3			
3	Carries sack & maintains balance (does not lean into sack; does not lean opposite of sack; does not reach to “catch” self)	X										3	✓		✓
4	Opens door wide enough to walk through it with the sack (does not bump into door or doorframe when exiting)	X										3			
5	Lowers sack to floor in a controlled manner (does not drop sack; a “thud” is not heard when cans are placed on floor)	X										3			✓
6	Pivots self around to face door & maintains balance (does not reach for wall for support; does not reach to “catch” self)	X										3			
7	Closes door in a controlled manner (does not shut door on foot) & maintains balance (does not reach for wall for support; does not reach to “catch” self)	X										3			✓
8	Reopens door using key within 3 tries (no more than 3 clicks of the key or “snapping” of the lock are heard)	X										3			

*Note: Preparatory actions (i.e., checking to make sure key operates lock) are not included in subtask criteria and therefore are not rated.*

*#1 catches self (safety/quality)*

*#4 bumps into doorframe, stumbles, catches self (safety/quality)*

*#5 dropped sack, thud (quality)*

*#7 holds onto doorframe when closing door*

SUMMARY SCORES	
INDEPENDENCE MEAN SCORE	3
	↑
SAFETY SCORE	2
	↑
ADEQUACY SCORE	2
	↑

### Task # H13: IADL-C: Telephone Use

HOME CONDITIONS: Location where telephone is easy to access and

1. Telephone
2. The local Consumers Yellow Pages Directory
3. Client seated at table with items 1 & 2 on table in front of Client

### HOME INSTRUCTIONS:

“Please call the drug store where you usually purchase your medicines – or one that is in your community. Find out what time the store closes tomorrow. After you hang up, tell me what the person says. Do you know what you are to do? Do you have everything you that 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 # H13: 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 →															
Subtasks	Subtask Criteria														
1	<u>Obtains correct number</u> of pharmacy (from phone book, operator, personal phone list, memory, etc.)	X										3			
2	<u>Lifts</u> telephone <u>receiver correctly</u> (ear piece to ear; mouth piece to mouth)	X										3			
3	<u>Dials</u> pharmacy <u>number correctly</u> (number dialed corresponds to the one selected)						√					2			√
4	<u>Obtains information correctly</u> (Home=closing time)	X										3			
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)	X										3			
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)	X										3			
7	<u>Reports information</u> that is <u>plausible</u> (“typical” hours)	X										3			

*Clarification – pharmacy; pill bottle for number*

*#1 was able to obtain the number however in subtask #4 client wasn't able to dial number correctly – quality/standard not met; get a piece of paper/write the number in large print (task rearrangement)*

SUMMARY SCORES	
ADEQUACY SCORE ↑	2
SAFETY SCORE ↑	
INDEPENDENCE MEAN SCORE ↑	2.8

## Task # H14: IADL-C Medication Management

### HOME CONDITIONS: Table and

1. Seven-day medication sheet with 4 subdivisions for each day – Morning, Noon, Evening, Bedtime
2. 2 of Client's prescription medications;
  - If Client is taking only 1 medication, substitute PASS-Home child-proof lid (C-P) medication containing red vitamin pills and a typed label that reads "Take 2 with breakfast and one with lunch and dinner";
  - If Client is not taking any prescription medications, add the PASS-Home non-child-proof lid (N-C-P) medication containing yellow vitamin pills and a typed label that reads "Take 1 tablet with lunch and 1 at bedtime."
3. Items 1-2 on table in front of Client
4. Client seated at the table

Client has.....	Present 1st	Present 2nd
2 meds	Either med	Either med
1 med	PASS-Home C-P lid med	Client's med
0 meds	PASS-Home C-P lid med	PASS-Home N-C-P lid med

### HOME INSTRUCTIONS:

"The next task involves managing medications. Please show me where you keep your medications. [Select 2 medications to use for the assessment, preferably with different time schedules]. I need to borrow these two bottles for the next task. I will put them back as soon as we are done." [Return to the table where the task items are set up]

"Please read the prescription label and find the directions for taking this medication [Hand Client first bottle of own medication or 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 second bottle of own medication or 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 # H14: 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)	X										3			
2 Med 1 C-P	<u>Opens first pill bottle with ease</u> (by second try)			√							√	0		√	√
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)			√	√							2		√	√
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)	X										3			
5 Med2 N-C-P	<u>Opens second pill bottle with ease</u> (by second try)	X										3		√	
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)	X										3			

#2 can you try it again in a different way (VND/process/quality); unable to open bottle  
 #3 do you recall what the instructions were (VND); the instructions were . . . (VD) – process/quality  
 #5 drops pills (economy of effort/process)

SUMMARY SCORES	
2.3	INDEPENDENCE MEAN SCORE ↑
3	
2	SAFETY SCORE ↑
	ADEQUACY SCORE ↑

# **Task #H15: IADL-P: Changing Bed Linens (Heavy Housework)**

HOME CONDITIONS: Bedroom area, and

1. Bed, "as is"
2. Client facing one side of the bed

## HOME 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. If you wish to put clean sheets on the bed, go ahead and get them now. Otherwise, please remove the bedding down to the sheets, remove one pillowcase, and then put the same bedding back on. 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 # H15: 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 &amp; maintains balance</u> (removes everything except the mattress pad; does not “catch” self on bed or other furniture; does not trip)	X										3		
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)	X										3		
3	<u>Puts on &amp; tucks in 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)	X										3	✓	✓
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)	X										3	✓	✓
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)	X										3		✓
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)	X										3		

#3 edges touching floor (safety/quality)

#4 edges touching floor; lack of economy of effort; edges touching floor (safety/process/quality)

#5 drops pillow (process)

Note: Item for discussion: What cues should the therapist have given the client?

SUMMARY SCORES	
INDEPENDENCE MEAN SCORE	3
SAFETY SCORE	2
ADEQUACY SCORE	1

### Task #H16: IADL-C: Obtaining Critical Information from the Media (Auditory)

#### HOME CONDITIONS: Table and

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

#### HOME 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 # H16: 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> (Home=contaminated tuna fish)			√								2		√ √
2	<u>Reports an action to be taken</u> as a result of the problem that is plausible (Home=check lot number on tuna fish, bring tuna fish back to store to be checked)				√√							2		√ √

#1 what did the announcement say? (VND) – process/quality

#2 did the announcement say something about what to do with the bad tuna (VD) – quality/process; did not report an action to be taken; What would you do with the bad tuna in your home (VD)

## SUMMARY SCORES

2

INDEPENDENCE  
MEAN SCORE ↑

SAFETY  
SCORE ↑

1

ADEQUACY  
SCORE ↑

# **Task # H17: IADL-C: Obtaining Critical Information from the Media (Visual)**

HOME CONDITIONS: Table and

1. Newspaper article about power surges and power outages
2. Client seated at table

## HOME 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 # H17: 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> (Home=power surges/power outages)				√							2		√
2	<u>Reports an action</u> to be taken as a result of the problem that is <u>plausible</u> (Home=reduce use of electrical appliances during peak hours, reduce number of time refrigerator is opened, run appliances on reduced power, keep flashlights in each room, keep extra batteries, don't open freezer, if food thaws and is discolored or smells spoiled, discard it immediately)				√		√					1	√	√

*Did it say anything about how it would affect you . . . therapist was gathering more information – not an assist*  
*#1 Take a look at the article again and tell me if repairs will affect you (VD/quality)*  
*#2 Throw away all food, article tells you to throw away; when would you throw away your food (VD/quality); not plausible (quality); find the spot in the article (task rearrangement) – process/imprecision*

SUMMARY SCORES	
1.5	INDEPENDENCE MEAN SCORE ↑
	SAFETY SCORE ↑
1	ADEQUACY SCORE ↑

### Task #H18: IADL-C: Flashlight Repair (Home Maintenance)

#### HOME CONDITIONS: Table and

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

#### HOME 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	
			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 # H18: 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	Manipulates the flashlight parts adequately to determine problem (unscrews end or top; Home=replaces dead batteries)	X										3			
2	Identifies the problem correctly (Home=dead batteries)	X										3			
3	Solves the problem correctly (flashlight is operational)				√√							2		√	√

#3 puts batteries in flashlight incorrectly (quality/process);  
check batteries (VD) – no its ok (quality/process);  
check the picture (VD)

SUMMARY SCORES	
ADEQUACY SCORE	2
SAFETY SCORE	3
INDEPENDENCE MEAN SCORE	2.6

**Task #H19: IADL-P: Sweeping (Home Maintenance)**

HOME CONDITIONS: Floor area near kitchen table and

1. ½ cup of dry cereal spilled on kitchen floor over a 12 inch area
2. Client's usual floor cleaning equipment or brush and dustpan in PASS kit
3. Client standing next to table

---

**HOME 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 # H19: 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			√
2	<u>Dumps all cereal</u> from dust pan into <u>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)	X										3			

#1 can you check (VND); doesn't clean up ALL cereal (quality)

#2 should I throw it away – yes – this was clarification not an assist

2

↑

ADEQUACY SCORE

3

↑

SAFETY SCORE

2.5

↑

INDEPENDENCE MEAN SCORE

## Task #H20: FM: Indoor Walking

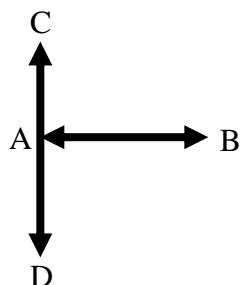
HOME CONDITIONS: Total apartment or first floor of the home, and

1. Use of walking aid if normally used
2. Client standing next to assessor on one side of room at center of home

### HOME 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 room 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 # H20: 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 &amp; maintains balance</u> (no loss of balance; no reliance on furniture or walls for stabilization; no bumping into/stumbling over furniture)	X										3			
2 A to C And return	<u>Walks across area, turns, &amp; walks back &amp; maintains balance</u> (no loss of balance; no reliance on furniture or walls for stabilization; no bumping into/stumbling over furniture)	X										3			
3 A to D and return	<u>Walks across area, turns, &amp; walks back &amp; maintains balance</u> (no loss of balance; no reliance on furniture or walls for stabilization; no bumping into/stumbling over furniture)	X										3			

SUMMARY SCORES	
<div>3</div> <div>INDEPENDENCE MEAN SCORE ↑</div>	<div>3</div> <div>SAFETY SCORE ↑</div>
<div>3</div> <div>ADEQUACY SCORE ↑</div>	

## Task #H21: IADL-C: Home Safety

### HOME CONDITIONS: Home/Apartment and

1. 10 foot extension cord placed across floor of a doorway. [Client should not observe placement of cord]
2. Pointed scissors in open position, placed at table edge with blades over edge
3. The following items placed on a kitchen cupboard that is used for food storage
  - 1 can of tuna fish
  - 1 can of cat food with a label that has similar colors and type size
4. Client standing, in turn, in front of each of the above displays

### HOME 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 extension cord crossing the doorway

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

Ct facing the scissors in the drawer

"Here is the second situation. [Sweep hand over general area above the table]. 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 # H21: 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 cord	<u>Identifies correctly the hazard to tripping</u> (Home=one could trip on electrical cord)	X										3			
2 cord	<u>Identifies way to correct the tripping hazard</u> that is <u>acceptable</u> (Home=remove cord, secure the cord along the wall)	X										3			
3 scissors	<u>Identifies correctly the sharps hazard</u> (Home=scissor blades extending over table edge)	X										3			
4 scissors	<u>Identifies way to correct the sharps hazard</u> that is <u>acceptable</u> (Home=close scissors and store in a drawer)	X										3			
5 cat food	<u>Identifies correctly the storage problem</u> (Home=cat food could be eaten instead of tuna)			✓	✓							2		✓	✓
6 cat food	<u>Identifies way to correct the storage problem</u> that is <u>acceptable</u> (Home=remove cat food from kitchen food cupboard and store in cupboard that doesn't hold food for human consumption)	X										3			

#5 it's not falling off shelf (process/quality)

Anything else (VND)

I don't think so (quality)

Read each can to see if there is any problem storing them (VD)

**SUMMARY SCORES**

2.8

INDEPENDENCE MEAN SCORE

↑

SAFETY SCORE

↑

2

ADEQUACY SCORE

↑

## Task #H22: IADL-C: Playing Bingo

### HOME CONDITIONS: Table and

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

### HOME 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 # H22: 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	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>Marks numbers correctly</u> (no numbers marked that have not been called; no numbers unmarked that have been called)	X										3		
2	<u>Calls "BINGO" promptly</u> (immediately after N42 is called)				✓							2	✓	✓

#2 doesn't call Bingo (process/quality – missing step)  
Can you check your card (VD)

SUMMARY SCORES	
ADEQUACY SCORE	2
SAFETY SCORE	
INDEPENDENCE MEAN SCORE	2.5

**Tasks # H23, # H24, # H25, # H26: IADL-C: Oven Use, Stovetop Use, Use of Sharp Utensils (Meal Preparation); IADL-P: Clean up after Meal Preparation (Light Housework)**

**HOME CONDITIONS:** Kitchen area and

1. Electric or gas stove with oven
2. Sink, "as is"
3. Usual meal preparation utensils and supplies (e.g., spoons, spatula, bowls, oven mitt/pot holder, etc.)
4. Apple placed in refrigerator, within easy view when door is opened
5. Muffin tin for 6 muffins and muffin mix requiring only the addition of water/milk
6. Can of soup requiring the addition of water/milk\*
7. Cookie sheet on kitchen counter nearest stove, with items 5-6 stacked on it
8. Assessor holding 3 x 5 inch menu card with the following directions:  
"Muffins made with water/milk, soup made with water/milk, apple cut with knife into 8 sections with the peel removed"
9. Client facing the kitchen counter

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

**HOME 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."

"The muffins and the soup that you selected to prepare are on the kitchen counter [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 your own dishes to put it on the table."

"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."

"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 # H23: 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		√	√
2	<u>Sets oven temperature control correctly</u> (as designated on instructions)	X										3			
3	<u>Measures liquid correctly</u> (amount listed on the package)	X										3			
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)	X										3			
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)	X										3			
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)	X										3	√		√
7	<u>Turns off oven promptly</u> (before or immediately after removal of food)	X										3			√
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)	X										3			
9	<u>Transports muffins to table correctly</u> (uses cart if weakness, tremor or instability present; does not spill on floor)	X										3			

*#1 I'm not sure; what do you think you need to consider (VND); yes – what are you going to cook first – repeating question (process/quality)*

*#6 reaches in oven (safety/quality)*

*#7 delayed in turning off oven (quality)*

**SUMMARY SCORES**

**2.8**

INDEPENDENCE MEAN SCORE ↑

**2**

SAFETY SCORE ↑

**2**

ADEQUACY SCORE ↑

Tasks # H23, # H24, # H25, # H26: IADL-C: Oven Use, Stovetop Use, Use of Sharp Utensils (Meal Preparation); IADL-P: Clean up after Meal Preparation (Light Housework)

## Stovetop Use

*#1 uses knife; safer way (VND); spoon (VD) – safety issue  
#7 towel on stove – safety issue  
#10 small (minor) drips on counter*

*Note: Item for discussion: What additional cues should the therapist have given the client?*

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 # H24: 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	√		
2	<u>Removes/handles soup can lid correctly</u> (lifts lid with knife; punches lid into can; does not cut finger)	X										3			
3	<u>Pours/spoons soup into pan without spilling</u> (no soup on Ct, counter, or floor)	X										3			
4	<u>Adds liquid correctly</u> (adds 1 can of water/milk; does not spill on self, floor)	X										3			
5	<u>Places pan on correct stove burner</u> (burner closest to pan size)	X										3			
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)	X										3			
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)	X										3	√		
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)	X										3			
9	<u>Turns burner off promptly</u> (+/- 1 minute of removing soup from burner)	X										3			
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)	X										3			
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)	X										3			

2.9

↑

INDEPENDENCE  
MEAN SCORE

2

↑

SAFETY  
SCORE

3

↑

ADEQUACY  
SCORE

SUMMARY SCORES

Tasks # H23, # H24, # H25, # H26: 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 # H25: 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	Obtains correct fruit from refrigerator (Apple)	X										3		
2	Selects appropriate knife (selects paring knife or other small knife)	X										3		
3	Cuts fruit into 8 parts, removes seeds, & removes peel correctly (8 pieces; seeds removed; peel removed)			√	√√							2		√
4	Transports plate with fruit to table correctly (does not carry knife along; uses cart if weakness, tremor, or instability present; does not spill on floor)	X										3		

#3 recall instructions (VND), how many pieces (VD), 8 pieces (VD)  
– process/quality

SUMMARY SCORES	
INDEPENDENCE MEAN SCORE	2.7
SAFETY SCORE	3
ADEQUACY SCORE	2

Tasks # H23, # H24, # H25, # H26: 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 # H26: 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	Collects all dirty dinner/cookware from meal preparation tasks (gathers items from stove, counter, table, etc.)			✓	✓							2			✓
2	Prepares water and soap for washing dinner/cookware in sink adequately (suds apparent, water warm or hot to the touch)	X										3			
3	Washes dinnerware adequately (no food particles or residue left on dishes)	X										3			
4	Rinses dinnerware adequately (no soap bubbles, food particles, or residue apparent with visual inspection)	X										3			
5	Places washed/rinsed dishes, pans, & utensils in drainer to air dry correctly (no items left on counter or in sink; no food particles, soap, or residue apparent with visual inspection)	X										3			
6	Clears/cleans all work surfaces used (counter, table, stove, sink, floor) adequately (puts leftovers in refrigerator or garbage; does not scrape scraps onto floor; wipes work surfaces so that no food scraps or residue are visible)			✓	✓							2			✓

#1 anything else you need to do (VND); wash the pan (VD) – quality

#2/3 used dishwasher to wash dinnerware – acceptable – meets criteria

#6 anything else (VND); take a look at the counters (VD) - quality

SUMMARY SCORES	
2.6	INDEPENDENCE MEAN SCORE ↑
3	SAFETY SCORE ↑
2	ADEQUACY SCORE ↑