

MFEI Level of Care Tool

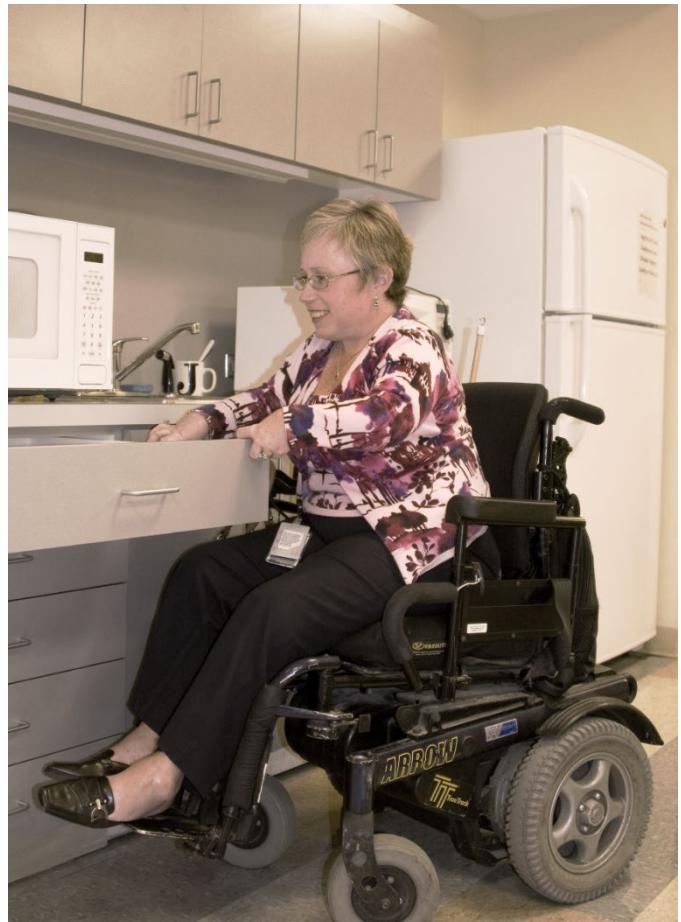
Module 6 – Instrumental Activities of Daily Living (IADLs)

Module 6: IADL

Self-Performance and Capacity

Covered in this module:

- Meal preparation
- Ordinary housework
- Managing finances
- Managing medications
- Phone use
- Shopping
- Transportation



13. IADL Self-Performance and Capacity

Intent: To examine the areas of function that are most commonly associated with independent living (instrumental activities of daily living, or IADLs)

Process:

- Ask the person about their performance of normal activities around the home or in the community in the last 3 days
- You may also talk to family members or caretakers if they are available
- Use your own observation as you are gathering information on other LOC items

13. IADLs: Performance and Capacity

Performance – Measures what the person **actually did** within each IADL category in the **last 3 days**. Do not base this coding on what the person might be capable of doing (see the Capacity category)

Capacity – Code based on the person's **presumed ability to carry out the activity**. Consider whether the person is doing the activity **safely**. If the person is doing the activity in a way that could negatively affect their health or safety, then code them for the level of help they would need to perform the task safely. This may require speculation by the assessor or information from a collateral source. Even if the activity did not occur for performance, capacity must still be rated; capacity can never be coded “Activity did not occur”

Performance = what the person **actually does**

Capacity = what the person **can do**

13. IADLs: Assessing Performance and Capacity

- First, determine whether the person actually performed the activity
- If they performed the activity, identify if they were able to do it independently or if they needed some level of support
- Then evaluate whether the person is capable of performing the task and what level of support they would need to complete the task

13. IADLs: Assessing Performance and Capacity

- Due to lack of skills or experience, a person may not perform some activities, but would be capable of doing so with the proper training or opportunity
- Therefore, it is important to distinguish between nonperformance that is due to impairment of capability (caused by health or functioning problems) and nonperformance that is due to other factors (not related to the person's health or functioning, e.g., cultural or gender expectations)

a. Meal Preparation

Definition: How meals are prepared (e.g., planning meals, assembling ingredients, cooking, setting out food and utensils)

➤ *Assess this item in terms of the person's ability to put meals together, regardless of the quality or nutritional value of the meal*

Example Questions:

- How do you make your meals?
- If you partner/caregiver did not cook dinner, would you be able to make a sandwich or some other meal?
- Do you get home delivered meals? If so, are you able to heat them up?

b. Ordinary Housework

Definition: How ordinary work around the house is performed (e.g., doing dishes, dusting, making bed, tidying up, laundry)

Example Questions:

- How do you clean things around the home like (name activities)?
- Are you receiving help in cleaning your home?

c. Managing Finances

Definition: How bills are paid, checkbook is balanced, household expenses are budgeted, and credit card account is monitored

Example Questions:

- Tell me how you get your bills paid every month? How do you decide what needs to be paid? Do you write and mail the checks?
- Does anyone help you pay your bills or manage your money?

d. Managing Medications

Definition: How medications are managed (e.g., remembering to take medicines, opening bottles, taking correct drug dosages, giving injections, applying ointments)

➤ *This item does NOT include how medications are shopped for or purchased*

Example Questions:

- Tell me how you take your medications every day?
- Do you use anything to help you remember to take them?
- Does anyone help you take your medications?

e. Phone Use

Definition: How telephone calls are made or received (with assistive devices such as large numbers on telephone, amplification as needed)

- This does not refer to using the internet, playing games/apps, or other smart phone features; it is strictly how telephone calls are made or received

Example Questions:

- Are you able to make calls on your own? Do you have any trouble with using the telephone?
- Can you access important phone numbers?
- Can you hold the phone up to your ear throughout the conversation or do you use the speaker?
- Are you able to look up numbers that you need to call? If so, how?

f. Shopping

Definition: How shopping is performed for food and household items (e.g., selecting items, paying money)

- *Shopping does not include transportation to shopping destinations, nor getting items from the store to the vehicle or from the vehicle into the person's home*
- *Shopping can include online shopping*

Example Questions:

- How do you get your shopping done?
- Does anyone help you? What do they do for you?
- How much could you do if they were not available?
- Do you get tired while shopping?
- Do you have difficulty getting items off of shelves?

g. Transportation

Definition: How travels by public transportation (navigating system, paying fare) or driving self or as a passenger (including getting out of house, into and out of vehicles)

➤ *Person may not drive but could still be independent*

Example Questions:

- How do you get around town? What type of transportation do you use?
- Tell me how you get in and out of vehicles?
- Does someone else arrange your rides?
- Are you able to get your wheelchair/walker in/out of the car?

13. IADLs: Coding

- Independent** – No help, setup or supervision needed
- Setup help only** *NOTE: set-up help refers to preparatory or clean-up assistance that can occur before or after the IADL task; if a person needs assistance during the IADL task, “supervision” or higher is more appropriate*
- Supervision** – Oversight/cueing required
- Limited Assistance** – Help required on some occasions
- Extensive assistance** – Help required throughout task, but performs 50% or more of task on own
- Maximal assistance** – Help required throughout task, but performs less than 50% of task on own
- Total dependence** – Full performance of activity by others during entire period
- Activity did not occur** – During entire period

*NOTE: You may use this code to score the Performance category, but **do not** use it to score Capacity category*

- See manual for examples of these codes for each IADL

13. IADLs: Coding Examples (Performance)

Ordinary Housework	
	Performance
Independent (no help, setup, or supervision)	Mr. B does all of his own housework. He did his housework yesterday, in preparation for your visit.
Setup help only	Mr. B did all of his own housework except for laundry yesterday. His caregiver helps him with this task by setting out which clothes need to be washed and the laundry detergent.
Supervision (oversight/cueing)	Mr. B did his own housework two days ago with verbal reminders and prompting from his caregiver.

13. IADLs: Coding Examples (Performance)

Ordinary Housework	
	Performance
Limited assistance (help on some occasions)	Mr. B did his own housework this morning, but received some help to do his laundry. His caregiver carried his laundry basket to and from the laundry room.
Extensive assistance (help throughout task, but performs 50% or more of task on own)	Mr. B does his own housework with some help from his caregiver. His caregiver provides assistance to complete some of the tasks (e.g. putting away the dishes when Mr. B washes them, carrying the laundry basket, and emptying the trash.) Mr. B washed dishes this morning and did other chores yesterday.

13. IADLs: Coding Examples (Performance)

Ordinary Housework	
	Performance
Maximal assistance (Help throughout task, but performs less than 50% of task on own)	Mr. B sorts his own laundry, but all other tasks related to housework are done by his caregiver. They did the laundry this morning, and Mr. B's caregiver did housework over the last 2 days.
Total dependence (full performance by others during the entire period)	Mr. B's caregiver does all of the activities related to housework. His caregiver does them throughout the week while Mr. B naps or watches TV.
Activity did not occur during the entire period (DO NOT USE THIS CODE FOR CAPACITY)	Neither Mr. B nor his caregiver did any housework over the last 3 days.

13. IADLs: Coding Examples (Capacity)

Ordinary Housework	
	Capacity
Independent (no help, setup, or supervision)	Mr. B does not do housework because his wife handles it. However, if need be, Mr. B is capable of performing his own housework.
Setup help only	Mr. B can do all of his own housework, but needs help with laundry. He can do his own laundry as long as his caregiver sets out the clothes that need to be washed and the laundry detergent. (Capacity is same as performance in this example)
Supervision (oversight/cueing)	Mr. B reports that he can do his own housework. However, his daughter informs you that Mr. B cannot do his laundry or vacuum unless she is there to remind him and cue him to complete various steps related to completing these chores.

13. IADLs: Coding Examples (Capacity)

Ordinary Housework	
	Capacity
Limited assistance (help on some occasions)	Mr. B has been doing all of his own housework, but shared that he has struggled with the laundry basket and recently fell during this chore. Therefore, the assessor concludes that he needs help with laundry but can continue to perform his other chores independently.
Extensive assistance (help throughout task, but performs 50% or more of task on own)	Mr. B can do most of his own housework, but needs help to complete some tasks (e.g. putting away the dishes when Mr. B washes them, carrying the laundry basket, and emptying the trash). (Capacity is same as performance in this example)

13. IADLs: Coding Examples (Capacity)

Ordinary Housework	
	Capacity
Maximal assistance (Help throughout task, but performs less than 50% of task on own)	Mr. B can sort his own laundry, but he cannot do any of the other tasks related to housework. (Capacity is same as performance in this example)
Total dependence (full performance by others during the entire period)	Mr. B's caregiver has encouraged him to help with some of the housework in the past, but she informs you that he can no longer help with any of the tasks. (Capacity is same as performance in this example)
Activity did not occur (during the entire period DO NOT USE THIS CODE FOR CAPACITY)	This code is not used for capacity. Identify which of the other codes are most appropriate for Mr. B's ability to do housework.

Practice Scenarios

IADL: Practice Scenario A

Mr. S has not made any meals for himself as his daughter is visiting and she has done all the cooking over the last 3 days. Mr. S tells you he can cook for himself, without any help, but when his daughter visits she really enjoys cooking so he lets her prepare and cook all his meals.

Based on this information, how would you code item 13a. *Meal Preparation* (Performance and Capacity) for Mr. S?

IADL Practice Scenario A:

Answer

Mr. S has not made any meals for himself as his daughter is visiting and **she has done all the cooking over the last 3 days**. Mr. S tells you **he can cook for himself, without any help**, but when his daughter visits she really enjoys cooking so he **lets her prepare and cook all his meals**.

Performance: Total dependence (full performance of activity by others during entire period)

Capacity: Independent (no help, setup or supervision needed)

IADL: Practice Scenario B

Mrs. S states that she does most of the housework herself, and in fact just finished before you arrived. However, she states she doesn't mop the kitchen floor any more. She states that she slipped and fell on the wet kitchen floor a couple of months ago, and since that time her son mops the floor for her. The last time her son helped her was a week ago.

Based on this information, how would you code item 13b. *Ordinary Housework* (Performance and Capacity) for Mrs. S?

IADL Practice Scenario B:

Answer

Mrs. S states that **she does most of the housework herself, and in fact just finished before you arrived.** However, she states she doesn't mop the kitchen floor any more. She states that she slipped and fell on the wet kitchen floor a couple of months ago, and since that time **her son mops the floor for her.** The last time her son helped her was a week ago.

Performance - Independent (no help, setup or supervision needed)

Capacity - limited assistance (help required on some occasions)

IADL: Practice Scenario C

Mr. C's niece helps him with paying his bills and balancing his checkbook. Mr. C gets the bills and checkbook out but his niece writes the checks, puts them in envelopes and mails them. She also talks to the teller when they go to the bank. Mr. C states he likes this arrangement and believes that if he had to do it himself he would be unable to keep everything straight and would mess things up. The last time they paid bills and went to the bank was 2 weeks ago.

**Based on this information, how would you code item 13c.
Managing Finances (Performance and Capacity) for Mr. C?**

IADL Practice Scenario C: Answer

Mr. C's niece helps him with paying his bills and balancing his checkbook. **Mr. C gets the bills and checkbook out but his niece writes the checks, puts them in envelopes and mails them. She also talks to the teller when they go to the bank.** Mr. C states he likes this arrangement and believes that if he had to do it himself he would be unable to keep everything straight and would mess things up. **The last time they paid bills and went to the bank was 2 weeks ago.**

Performance: Activity did not occur

Capacity: Maximal assistance (help required throughout task, but performs less than 50% of task on own)

IADL: Practice Scenario D

Ms. H has mobility limitations due to multiple sclerosis. She typically orders and administers her own medications, which have all been oral. However, four days ago, she developed a fungal infection on her lower back. Because she does not have the mobility or dexterity to apply a prescribed ointment on her back, her sister has been doing it. This will last for seven days.

Based on this information, how would you code item 13d. *Managing Medications* (Performance and Capacity) for Ms. H?

IADL Practice Scenario D:

Answer

Ms. H has mobility limitations due to multiple sclerosis. She **typically orders and administers her own medications, which have all been oral**. However, four days ago, she developed a fungal infection on her lower back. Because **she does not have the mobility or dexterity to apply a prescribed ointment on her back, her sister has been doing it. This will last for seven days.**

Performance: Limited assistance (Help required on some occasions)

Capacity: Limited assistance (Help required on some occasions)

IADL: Practice Scenario E

Mrs. W is a former chef who has rheumatoid arthritis. She enjoys preparing meals for her family, including shopping for the items. Due to her arthritis it takes her longer to complete her shopping and she has had to ask the person who sacks her groceries to carry them to the car for her. The last time she went shopping was 2 days ago.

Based on this information, how would you code item 13f. *Shopping (Performance and Capacity)* for Mrs. W?

IADL Practice Scenario E: Answer

Mrs. W is a former chef who has rheumatoid arthritis. She enjoys preparing meals for her family, **including shopping for the items**. Due to her arthritis it takes her longer to complete her shopping and she has had to ask the person who sacks her groceries to carry them to the car for her. The last time she went shopping was **2 days ago**.

Performance: Independent (no help, setup or supervision needed)

Capacity: Independent (no help, setup or supervision needed)

Note: Carrying groceries to or from vehicle is not included in this task.

IADL: Practice Scenario F

Ms. A is 85 years old and uses the paratransit van weekly to travel to and from the local senior center. The driver reminds her to get off at the senior center. She calls and makes arrangements for rides on the van on her own. However, numerous times over a two-month period, including yesterday, she forgot to bring some cash to pay the fare. So, now, her caregiver reminds her each week to keep money in her purse to pay the fare.

Based on this information, how would you code item 13g. *Transportation (Performance and Capacity)* for Ms. A?

IADL Practice Scenario F: Answer

Ms. A is 85 years old and uses the paratransit van weekly to travel to and from the local senior center. **The driver reminds her to get off at the senior center.** She **calls and makes arrangements for rides on the van on her own.** However, **numerous times over a two-month period, including yesterday,** she forgot to bring some cash to pay the fare. So, **now, her caregiver reminds her each week to keep money in her purse to pay the fare.**

Performance: Supervision (oversight/cueing required)

Capacity: Supervision (oversight/cueing required)