

## **Introduction to Personal Care Assessment Key**

Information in this Key helps you understand your personal care assessment. Each section gives information about a different part of the assessment. Click on the links below or scroll down to find each section.

## Table of Contents

### Key for Personal Care Assessment

1. <a href="#"><u>Introduction to Personal Care Assessment Key</u></a>	<a href="#"><u>1</u></a>
2. <a href="#"><u>Activities of Daily Living</u></a>	<a href="#"><u>3</u></a>
a. <a href="#"><u>Scoring Factors</u></a>	<a href="#"><u>3</u></a>
b. <a href="#"><u>Activities of Daily Living (ADLs) Descriptions</u></a>	<a href="#"><u>5</u></a>
3. <a href="#"><u>Instrumental Activities of Daily Living</u></a>	<a href="#"><u>7</u></a>
4. <a href="#"><u>Mood and Behaviors</u></a>	<a href="#"><u>8</u></a>
a. <a href="#"><u>General Information about Qualifying for Mood and Behaviors Group</u></a>	<a href="#"><u>8</u></a>
i. <a href="#"><u>Qualifying under Method #1</u></a>	<a href="#"><u>9</u></a>
ii. <a href="#"><u>Mood and Behavior Key #1</u></a>	<a href="#"><u>11</u></a>
iii. <a href="#"><u>Qualifying under Method #2</u></a>	<a href="#"><u>13</u></a>
iv. <a href="#"><u>Mood and Behavior Key #2</u></a>	<a href="#"><u>18</u></a>
5. <a href="#"><u>Cognitive Performance Score</u></a>	<a href="#"><u>22</u></a>
6. <a href="#"><u>Clinical Complexity</u></a>	<a href="#"><u>24</u></a>
7. <a href="#"><u>Exceptional Care</u></a>	<a href="#"><u>29</u></a>
a. <a href="#"><u>Qualifying under Method #1</u></a>	<a href="#"><u>29</u></a>
b. <a href="#"><u>Qualifying under Method #2</u></a>	<a href="#"><u>31</u></a>
8. <a href="#"><u>Informal Support</u></a>	<a href="#"><u>33</u></a>
9. <a href="#"><u>Offsite Laundry, Shopping, &amp; Wood Heat</u></a>	<a href="#"><u>45</u></a>

## **Activities of Daily Living**

Activities of Daily Living (ADLs) are basic activities like getting dressed, moving around, and eating. How we score the help you received with ADLs plays a big part in your in-home hours if you live in your own home or daily rate if you live in an Adult Family Home, Assisted Living, or other Residential Setting. A number score (0-4) is assigned to each Activity of Daily Living (ADL) task (see below).

We first tell you how ADLs are scored in your assessment. After that, we describe each ADL.

### **Activities of Daily Living (ADLs) Scoring:**

#### **Scoring Factors**

**Your scores depend on two major factors:**

1. What kind of help you received in the 7 days before your assessment.
  - a) Supervision means your caregiver helped you without touching you.
  - b) Non-weight bearing help means your caregiver touched you, but did not lift or support you.
  - c) Weight bearing help means you leaned on your caregiver or your caregiver lifted or supported you or a part of your body.
2. How many times you received that help in the 7 days before your assessment.
  - a) We only count help you received at least 3 times in the 7 days before the assessment.
  - b) If you received help only 1 or 2 times, it doesn't count.

**You may have received help with some, but not all, parts of the task.**

- For example, putting on shoes and socks is a part of Dressing. We looked at how much help you received with the whole task and how much help you received with parts of the task.

**We look at how you did your tasks:**

- Using equipment (like walker, cane or wheelchair); and
- After your caregiver set you up to do the task (such as brought you your walker, food to eat, or toothbrush to brush teeth).

**Total Dependence (scores as 4):**

Your caregiver performed the whole task for you every time you needed it and the task occurred at least 3 times in the 7 days before your assessment. You were not able to do any part of this task during the entire 7 days before your assessment.

**Extensive Assistance (scores as 3):**

- Your caregiver completely performed a part of the task for you 3 or more times in the 7 days before your assessment; or
- Your caregiver provided weight-bearing assistance during the task 3 or more times during the 7 days before your assessment.

**Limited Assistance (scores as 2):**

Your caregiver helped you complete the task or parts of the task and you actively participated. The assistance was not weight-bearing (as described above). Your caregiver helped you this way 3 or more times in the 7 days before your assessment.

**Supervision Assistance (scores as 1):**

Your caregiver reminded you, talked you through the task or parts of the task, or stood nearby to monitor 3 or more times in the 7 days before your assessment. You did the task without hands-on assistance.

**Independent (scores as 0):**

Your caregiver did not help you with the task or you received help only 1 or 2 times in the last 7 days before your assessment.

**Activity did not occur/No Provider (scores as 4):**

The task did not occur in the entire 7 days before your assessment because you did not have a caregiver available to assist you.

**Activity did not occur/Client not able (scores as 4):**

The task did not occur in the entire 7 days before your assessment because you were not able to do it even if you had caregiver assistance (such as walking, if paralyzed).

**Activity did not occur/Client declined (scores as 0):**

The task did not occur in the entire 7 days before your assessment because you chose not to accept help with or do the task.

**Activities of Daily Living (ADLs) Descriptions:**

We look at how you **Move** in three different ways. We use the highest score of the three. **If you are able to walk sometimes and also use a wheelchair sometimes, we look at how much help you need with both and use the higher score.**

**Walk in Room:** Help you received to walk in your home.

- This means all inside areas if you live at home or in an Adult Family Home.
- This means your room, the hallway and close sitting areas if you live in a larger building such as an assisted living facility.

**Locomotion In Room:** Help you received to move around your home if you use a wheelchair.

- This means how much help you received making your wheelchair move.

**Locomotion Outside Room:** Help you received to walk, including stairs, curbs, or on uneven ground and/or move your wheelchair, if you use a wheelchair.

- This means outside of your home or Adult Family Home, but still in the area. It includes to and from a patio or porch, in the yard, to the mailbox, to see the next-door neighbor, etc.
- If you live in a larger building, such as an assisted living facility, this means areas that are away from your room such as the dining room, activities center, and nearby outside areas such as the yard or parking lot.

**Bed Mobility:** Help you received to move to and from a lying position, turn side to side, and position your body while in bed, in a recliner or other type of furniture.

**Transfer:** Help you received to:

- Get in and out of a chair, couch, bed, or other furniture;
- Stand up and/or sit down;
- Get in and/or out of your wheelchair.

Transfer does not include getting in or out of the bath/shower, on or off the toilet or getting in or out of a car. These are covered under Bathing, Toileting, and Transportation.

**Toileting:** Help you received getting on and off the toilet, bedside commode, or bedpan, wiping or cleansing yourself, changing pads or briefs, and adjusting clothing. It also includes help you received to toilet even if you do not use a bathroom, including help with a catheter, colostomy, commode, or urinal.

**Eating:** Help you received to eat and drink. This means getting food or liquids from the dish or cup to your mouth or eating by other means such as tube feeding.

**Dressing:** Help you received to put on, fasten, and take off all items of clothing, including sleepwear, socks and shoes, and clothes you wear when you go outside. It also includes putting on and taking off braces, artificial limbs, and compression (TED) hose.

**Personal Hygiene:** Help you received to take care of your grooming and personal hygiene needs, including combing your hair, brushing your teeth, denture care, shaving, applying makeup, washing/drying your face and hands, fingernail care and help with

your period (menses care). It includes washing your hair in the sink at home or in a beauty/barber shop, but does not include bathing or taking a shower.

Your total ADL score is the sum of the scores for the following tasks:

Personal Hygiene	Bed Mobility	Transfers
Eating	Toilet Use	Dressing

And the highest score given from Walk in Room, Locomotion in Room,  
and Locomotion Outside Room.

**Bathing and Medication Management are ADLs, but they don't count in your ADL score.** Your overall hours are reduced when you have informal support with one or both.

**Bathing:** Help you received to take a full-body bath, shower or sponge bath. It also includes help you received to get in and out of the tub/shower.

**Medication Management:** Help you received to take or use prescription medications, over-the-counter medicines, vitamins, or herbal supplements.

### **Instrumental Activities of Daily Living:**

Instrumental Activities of Daily Living (IADLs) are routine activities performed around the home or in the community. IADLs include fixing meals, housework, shopping, travel to medical appointments. Wood supply is also included if your only source of heat is wood.

**Fixing meals** is also called **meal preparation**. It includes:

- planning meals; and
- assembling ingredients; and
- cooking; and
- setting out food and utensils.

It must include cooking or actual meal preparation.

**Housework** includes:

- doing dishes;
- dusting;

- making and changing beds;
- vacuuming;
- cleaning bathrooms and other rooms;
- taking out garbage;
- tidying up; and
- laundry.

**Shopping** includes getting food, medical necessities, and other household items. It also includes going to and from the store along with putting items away.

**Transportation** is limited to traveling to and from health care providers. It includes driving you to and from appointments. It also includes accompanying you to appointments if your paid caregiver does not use his or her vehicle to take you to your appointment.

### **Mood and Behaviors:**

The presence of certain Moods and Behaviors along with other things can affect your hours or rate. Those other things involve how a Mood or Behavior affects you now or has affected you in the past. If you're affected now, how often you're affected is important. It is also important to know how easy it is for a caregiver to manage a Mood or Behavior that affects you now. If Moods or Behaviors have affected you in the past, it is important to know if the things a caregiver does to manage them work.

First, we give you general information about qualifying for the Mood and Behaviors Group. After that are two sections that explain the two different ways to qualify for the Mood and Behaviors Group. Examples are provided for each method. After each section, there is a Key that gives more information.

### **General Information about Qualifying for Mood and Behaviors Group**

There are two ways to qualify for the Mood and Behaviors Group. Both ways have the following two things in common:

- You have a qualifying Mood or Behavior; and
- The **Status** of your Behaviors is either **Current** or **Past** (defined below).

We look at when a Behavior occurred.

- You have a **Current** Behavior if it occurred in the last 7 days.
  - You have a **Past** Behavior if it didn't occur in the last 7 days, but it did occur in the last 5 years.
- \* \* \*

For many (but not all) **Current** Behaviors, we look at:

- **Frequency**: how often it occurred in the last 7 days; and
- **Alterability**: how easy has it been for a caregiver to manage the mood or behavior in the last 7 days.

When **Alterability** is considered, we look to see if the behavior is:

- **Easily altered** - means the behavior is easy to manage; or
- **Not easily altered** - means the behavior is hard to manage.

For all **Past** Behaviors we look at:

- **Interventions**: Things a caregiver does to manage the behavior, if needed. When **interventions** are considered, we look at whether those interventions are effective.

**Note: Status, Frequency, Alterability, or Interventions** do not apply if you have a Depression Score or more than 14 or need Mental Health therapy or a Mental Health program.

## Qualifying under Method #1

You qualify if you have a current or past Mood or Behavior listed in Mood and Behaviors Key #1. Key #1 is right after the examples.

### Examples:

#### Example #1:

Sally was assessed today. She is **crying and tearful** every day. She qualifies for the Mood and Behavior Groups under Method #1. Sally's Status for this Behavior is **current**. The **frequency** of Sally's crying and tearfulness is **4 or more days per week**. Alterability and Interventions are not considered – they are not applicable. Sally meets the two requirements for qualifying. See the excerpt from the Key below. This excerpt tells you that **crying and tearfulness** must be a **current** behavior that occurs at least **4 or more days per week** to be a Method #1 qualifying behavior.

Mood or Behavior	Status	Frequency	Alterability	Interventions
Crying; tearfulness	Current	4 or more days per week	N/A	N/A

**Example #2:**

Bob was assessed today. Bob goes out on his front porch and takes off his clothes (**disrobes in public**). This happened at least **once in the 7 days** before the assessment. It is **not easy** for his care giver to manage this behavior. He qualifies for the Mood and Behaviors Group under Method #1. Bob's Status for this Behavior is **current**. Bob's behavior is **not easily altered**. Frequency and Interventions are not considered – they are not applicable. Bob meets the two requirements for qualifying.

Mood or Behavior	Status	Frequency	Alterability	Interventions
Disrobes in public	Current	N/A	Not easily altered	N/A

**Example #3:**

Sam was assessed today. Sam **used to break or throw items**. He has **not broken or thrown anything in the 7 days** before the assessment. He does not have any other Mood or Behavior listed in the Table below. Sam is no longer eligible for the Mood and Behaviors Group under Method #1. Sam's Status for this Behavior is **no longer current**. He does not meet the requirement for qualifying.

Mood or Behavior	Status	Frequency	Alterability	Interventions
Breaks/throws items	Current	N/A	N/A	N/A

**Example #4:**

John was assessed today. John **used to eat nonedible substances**. He **has not done this for a little over 3 years**. His caregiver reminds him not to do this and makes sure that the nonedible substances he used to consume are kept in an area that is not accessible to John. He does not have any other Mood or Behavior listed in the Table below. John's Status for this Behavior is **in the past**. This behavior is **addressed with current interventions**. John qualifies for the Mood and Behaviors Group under Method #1.

Mood or Behavior	Status	Frequency	Alterability	Interventions
Eats nonedible substances	In the past	N/A	N/A	Addressed with current interventions

## Mood and Behavior Key #1

Mood or Behavior	Status	Frequency	Alterability	Interventions
Assaultive	Current	N/A	N/A	N/A
Combative during personal care	Current	N/A	N/A	N/A
Combative during personal care	In the past	N/A	N/A	Addressed with current interventions
Crying; tearfulness	Current	4 or more days per week	N/A	N/A
Delusions: Delusions are a fixed, false belief.	In the past	N/A	N/A	Addressed with current interventions
Depression score of 14 or more	N/A	N/A	N/A	N/A
Disrobes in public	Current	N/A	Not easily altered	N/A
Easily irritable/agitated	Current	N/A	Not easily altered	N/A
Eats nonedible substances	Current	N/A	N/A	N/A
Eats nonedible substances	In the past	N/A	N/A	Addressed with current interventions
Hallucinations: Hallucinations are a sensory experience that can't be verified by anyone else.	Current	N/A	N/A	N/A
Hiding items	In the past	N/A	N/A	Addressed with current interventions
Hoarding/collecting	In the past		N/A	Addressed with current interventions

Mental health therapy/program	Therapy or program is needed	N/A	N/A	N/A
Repetitive complaints/questions	Current	Occurs daily	N/A	N/A
Repetitive complaints/questions	In the past	N/A	N/A	Addressed with current interventions
Repetitive movement/pacing	Current	Occurs daily	N/A	N/A
Resistive to care	Current	N/A	N/A	N/A
Resistive to care	In the past	N/A	N/A	Addressed with current interventions
Sexual acting out	Current	N/A	N/A	N/A
Sexual acting out	In the past	N/A	N/A	Addressed with current interventions
Spitting	Current	N/A	Not easily altered	N/A
Spitting	In the past	N/A	N/A	Addressed with current interventions
Breaks/throws items	Current	N/A	N/A	N/A
Unsafe smoking	Current	N/A	Not easily altered	N/A
Up at night and requires intervention	Current	N/A	N/A	N/A
Wanders and is exit seeking: moving about with no apparent purpose and tries to leave the residence or facility	Current	N/A	N/A	N/A
Wanders and is exit seeking: moving about with no apparent purpose and tries to leave the residence or facility	In the past	N/A	N/A	Addressed with current interventions
Wanders and is not exit seeking: moving about with no apparent purpose, but does not try to leave the residence or facility	Current	N/A	N/A	N/A
Wanders and is not exit seeking: moving about	In the past	N/A	N/A	Addressed with current

with no apparent purpose, but does not try to leave the residence or facility				interventions
Yelling/Screaming	Current	Occurs 4 or more days per week	N/A	N/A

## Qualifying under Method #2

There are five qualifying behavior categories for Method #2. Each behavior is listed in Key #2. To qualify under Method #2, you must have a Behavior Points Score (BPS) of more than 1, a CPS score of 3 or more, and an ADL score of 2 or more. Key #2 also helps you understand your BPS. Key # 2 is right after the examples.

Each category has a **maximum** number of behavior points. The maximum number of behavior points for:

- Category One is 2 points
- Category Two is 3 points
- Category Three is 4 points
- Category Four is 10 points
- Category Five is 12 points

Identify each behavior to determine whether it is a **current** behavior or a **past** behavior. If it is a **current** behavior, see whether it occurs **1-3 days per week, 4-6 days per week**, or **Daily**. The Weight scores for **current** behaviors are:

- 1-3 times per week: .5
- 4-6 times per week: .75
- Daily: 1

The Weight scores for past behaviors are:

- Past with no intervention required: 0
- Past with intervention required: .25

Next determine whether the behavior is **Easily Altered** or **Not Easily Altered**. Alterability of the behavior and the Behavior Category determine the Value score. The Value scores for behaviors are:

Category 1 behaviors:

- Current or past and easily altered: .5
- Current and not easily altered: 1

Category 2 behaviors:

- Current or past and easily altered: 1
- Current and not easily altered: 2

Category 3 behaviors:

- Current or past and easily altered: 2
- Current and not easily altered: 3

Category 4 behaviors:

- Current or past and easily altered: 4
- Current and not easily altered: 5

Category 5 behaviors:

- Current or past and easily altered: 5
- Current and not easily altered: 6

Weight Score multiplied by the Value Score = BPS Score for a behavior.

**Examples:**

**Example #1:**

Tom was assessed today. He **hides items (Category 1 Behavior)** and is not safe when he cooks (**unsafe cooking: Category 3**). He also **wanders and is exit seeking (Category 4)**. All three of these behaviors are **current**. They happen every day. His caregiver **cannot easily alter** the hiding of items. Tom's unsafe cooking and wandering/exit seeking can be **easily altered**. His Behavior Point Score (BPS) for Hiding Items is 1. His BPS for Unsafe Cooking is 2. His BPS for Wandering/Exit Seeking is 4. His total BPS is 7.

Tom's ADL score is 8 and his CPS score is 3. He meets the criteria for the Mood and Behaviors Group.

**Example #1 Table:**

Current Behaviors	Status/Frequency/Alterability	Weight	Value	BPS
Hiding Items	Current/Daily/Not Easily Altered	1	1	1 x 1 = 1
Unsafe cooking	Current/Daily/Easily Altered	1	2	1 x 2 = 2
Wanders/Exit Seeking	Current/Daily/Easily Altered	1	4	1 x 4 = 4
Total BPS = 7				

**Example #2:**

Jane was assessed today. Jane **wanders and is exit seeking (Category 4)**. She does this **4-6 days per week**. This behavior is **not easily altered**. Jane used to **break items (Category 4)**, but she hasn't done this for 2 years because her caregiver manages this behavior with **current interventions**. This behavior is a **past behavior with interventions**. Jane is **combative** when her caregiver has to give her a bath (**Category 5**). This happens **once per week** and is **not easily altered**. Jane's BPS is 8.

Jane's ADL score is 9 and her CPS score is 3. She meets the criteria for the Mood and Behaviors Group.

**Example #2 Table:**

Current Behavior	Status/Frequency/Alterability	Weight	Value	BPS
Wanders/Exit Seeking	Current/4-6 days per week/ Not Easily Altered	.75	5	.75 x 5 = 3.75
Combative during care	Current/1-3 days per week/Not Easily Altered	.5	6	.5 x 6 = 3
Current Behavior BPS = 6.75				

Past Behavior	Addressed w/ Interventions	Weight	Value	BPS
Breaks, throws items	Yes	.25	5	.25 x 5 = 1.25
Past Behavior BPS = 1.25				

Total BPS = 8 (6.75 + 1.25)

### **Example #3:**

Bert was assessed today. Bert is **crying and tearful (Category 1)** on a **daily** basis. This behavior is **not easily altered**. He is also **obsessive about his health (Category 1)** on a **daily** basis. Like his crying, this behavior is **not easily altered**. Bert is anxious and **paces (Category 1)** on a daily basis. This behavior is **not easily altered**. He **accuses others of stealing (Category 2)**. He does this on a **daily** basis. This behavior is **not easily altered**. Bert's BPS is 4.

Bert's ADL score is 11 and his CPS score is 3. He meets the criteria for the Mood and Behaviors Group.

### **Example #3 Table:**

Behavior	Status/Frequency/Alterability	Weight	Value	BPS
Crying/tearfulness	Current/Daily/ Not Easily Altered	1	1	$1 \times 1 = 1$
Obsessive about health or body functions	Current/Daily/ Not Easily Altered	1	1	$1 \times 1 = 1$
Repetitive movement/pacing	Current/Daily/ Not Easily Altered	1	1	$1 \times 1 = 1$
Accuses others of stealing	Current/Daily/ Not Easily Altered	1	2	$1 \times 2 = 2$

Total BPS = 4

Bert's BPS is only 4 because the first 3 behaviors are Category One behaviors. The maximum number of points Bert can get from Category One behaviors is 2. So, even though the total score for the first 3 behaviors is 3, the most points Bert can get from the first 3 behaviors is 2. See introductory language for a reminder about the maximum number of points allowable by Category. The Key tells you the maximum number of points that can be given for each category of behaviors and explains which behaviors are in each Category.

When adding up his Total BPS, add the maximum for Category One behaviors which is 2 to his other BPS score for accuses others of stealing which is 2. That equals 4.

### **Example #4:**

Connie was assessed today. Connie makes **inappropriate verbal noise (Category 1)** on a **daily** basis. This behavior is **not easily altered**. Connie also has **repetitive questions (Category 2)** for her caregiver on a **daily** basis. This behavior is **not easily**

**altered.** Connie is **verbally abusive (Category 2)** on a **daily** basis, but this behavior is **easily altered**. Connie sometimes **spits (Category 2)** at her caregiver. This happens **1-3 times per week**. This behavior is **not easily altered**. Connie used to **disrobe in public (Category 3)**, but has not done this in a little over a year. Her caregiver reminds Connie not to take off her clothes whenever Connie goes out. This behavior is **managed with interventions**. Connie used to be **assaultive (Category 4)** toward her roommates. She has not been assaultive for a little over two years. Her caregivers recognize what triggers Connie's assaultive behaviors and are able to calm her or remove her from the triggering environment. This behavior is now **managed with interventions**. Connie's BPS is 5.5.

Connie's ADL score is 13 and her CPS Score is 4. She meets the criteria for the Mood and Behaviors Group.

**Example #4 Table:**

Current Behaviors	Status/Frequency/Alterability	Weight	Value	BPS
Inappropriate verbal noise	Current/Daily/ Not Easily Altered	1	1	$1 \times 1 = 1$
Repetitive complaints/questions	Current/Daily/ Not Easily Altered	1	2	$1 \times 2 = 2$
Verbally abusive	Current/Daily/Easily Altered	1	1	$1 \times 1 = 1$
Spitting	Current/1-3 times per week/ Not Easily Altered	.5	2	$.5 \times 2 = 1$
Current Behavior BPS = 4				

Past Behaviors	Addressed w/ interventions	Weight	Value	BPS
Disrobes in public	Yes	.25	2	$.25 \times 2 = .5$
Assaultive	Yes	.25	4	$.25 \times 4 = 1$

Past Behavior BPS = 1.5

Total BPS = 5.5 (4 + 1.5)

Connie's total BPS is 5.5 instead of 6.5 because the second, third, and fourth behaviors are Category Two behaviors. There is a 3-point cap on the maximum number of points for Category Two.

## Mood and Behavior Key #2

Mood and Behavior	Current or Past Behaviors			Total
	<u>Weight</u>		<u>Value</u>	
<b>Category One</b>				
Crying and Tearfulness	Past w/Intervention = .25 1-3 days per week = .5 4-6 days per week = .75 Daily = 1	X	Past-w/intervention = .5 Easily Altered = .5 Not Easily Altered = 1	Total of Weight x Value
Easily Irritable/Agitated	Past w/Intervention = .25 1-3 days per week = .5 4-6 days per week = .75 Daily = 1	X	Past-w/intervention= .5 Easily Altered = .5 Not Easily Altered = 1	Total of Weight x Value
Obsessive about health or body functions	Past w/Intervention = .25 1-3 days per week = .5 4-6 days per week = .75 Daily = 1	X	Past-w/intervention = .5 Easily Altered = .5 Not Easily Altered = 1	Total of Weight x Value
Repetitive movement /pacing	Past w/Intervention = .25 1-3 days per week = .5 4-6 days per week = .75 Daily = 1	X	Past-w/intervention = .5 Easily Altered = .5 Not Easily Altered = 1	Total of Weight x Value
Hiding items	Past w/Intervention = .25 1-3 days per week = .5 4-6 days per week = .75 Daily = 1	X	Past-w/intervention = .5 Easily Altered = .5 Not Easily Altered = 1	Total of Weight x Value
Hoarding/Collecting	Past w/Intervention = .25 1-3 days per week = .5 4-6 days per week = .75 Daily = 1	X	Past-w/intervention = .5 Easily Altered = .5 Not Easily Altered = 1	Total of Weight x Value
Inappropriate verbal noise	Past w/Intervention =.25 1-3 days per week = .5 4-6 days per week = .75 Daily = 1	X	Past-w/intervention = .5 Easily Altered = .5 Not Easily Altered = 1	Total of Weight x Value
Wanders and is not	Past w/Intervention = .25	X	Past-w/intervention = .5	Total of

exit seeking: moving about with no apparent purpose, but does not try to leave the residence or facility	1-3 days per week = .5 4-6 days per week = .75 Daily = 1		Easily Altered = .5 Not Easily Altered = 1	Weight x Value
The maximum number of points you can have in Category One is 2 points.				Add scores from above columns for Category One Score EXCEPT score cannot be more than 2
<b>Category Two</b>				
Repetitive complaints/questions	Past w/Intervention = .25 1-3 days per week = .5 4-6 days per week = .75 Daily = 1	X	Past-w/intervention = 1 Easily Altered = 1 Not Easily Altered = 2	Total of Weight x Value
Rummaging through or takes others belongings	Past w/Intervention = .25 1-3 days per week = .5 4-6 days per week = .75 Daily = 1	X	Past-w/intervention = 1 Easily Altered = 1 Not Easily Altered = 2	Total of Weight x Value
Verbally abusive	Past w/Intervention = .25 1-3 days per week = .5 4-6 days per week = .75 Daily = 1	X	Past-w/intervention = 1 Easily Altered = 1 Not Easily Altered = 2	Total of Weight x Value
Yelling/Screaming	Past w/Intervention = .25 1-3 days per week = .5 4-6 days per week = .75 Daily = 1	X	Past-w/intervention = 1 Easily Altered = 1 Not Easily Altered = 2	Total of Weight x Value
Spitting	Past w/Intervention = .25 1-3 days per week = .5 4-6 days per week = .75 Daily = 1	X	Past-w/intervention = 1 Easily Altered = 1 Not Easily Altered = 2	Total of Weight x Value
Unrealistic fears or suspicions	Past w/Intervention = .25 1-3 days per week = .5 4-6 days per week = .75 Daily = 1	X	Past-w/intervention = 1 Easily Altered = 1 Not Easily Altered = 2	Total of Weight x Value
Accuses others of stealing	Past w/Intervention = .25 1-3 days per week = .5 4-6 days per week = .75 Daily = 1	X	Past-w/intervention = 1 Easily Altered = 1 Not Easily Altered = 2	Total of Weight x Value

The maximum number of points you can have in Category Two is 3 points.				Add scores from above columns for Category Two Score EXCEPT score cannot be more than 3
<b>Category Three</b>				
Resistive to care with words/gestures	<b>Past w/Intervention = .25 1-3 days per week = .5 4-6 days per week = .75 Daily = 1</b>	X	<b>Past-w/intervention = 2 Easily Altered = 2 Not Easily Altered = 3</b>	<b>Total of Weight x Value</b>
Up at night, requires intervention	<b>Past w/Intervention = .25 1-3 days per week = .5 4-6 days per week = .75 Daily = 1</b>	X	<b>Past-w/intervention = 2 Easily Altered = 2 Not Easily Altered = 3</b>	<b>Total of Weight x Value</b>
Unsafe cooking	<b>Past w/Intervention = .25 1-3 days per week = .5 4-6 days per week = .75 Daily = 1</b>	X	<b>Past-w/intervention = 2 Easily Altered = 2 Not Easily Altered = 3</b>	<b>Total of Weight x Value</b>
Inappropriate toileting/menses activity	<b>Past w/Intervention = .25 1-3 days per week = .5 4-6 days per week = .75 Daily = 1</b>	X	<b>Past-w/intervention = 2 Easily Altered = 2 Not Easily Altered = 3</b>	<b>Total of Weight x Value</b>
Unsafe smoking	<b>Past w/Intervention = .25 1-3 days per week = .5 4-6 days per week = .75 Daily = 1</b>	X	<b>Past-w/intervention = 2 Easily Altered = 2 Not Easily Altered = 3</b>	<b>Total of Weight x Value</b>
Left home and became lost	<b>Past w/Intervention = .25 1-3 days per week = .5 4-6 days per week = .75 Daily = 1</b>	X	<b>Past-w/intervention = 2 Easily Altered = 2 Not Easily Altered = 3</b>	<b>Total of Weight x Value</b>
Disrobes in public	<b>Past w/Intervention = .25 1-3 days per week = .5 4-6 days per week = .75 Daily = 1</b>	X	<b>Past-w/intervention = 2 Easily Altered = 2 Not Easily Altered = 3</b>	<b>Total of Weight x Value</b>
The maximum number of points you can have in Category Three is 4 points.				Add scores from above columns for Category Three Score EXCEPT score cannot be more than 4

Category Four				
Injures self – intentionally (includes head banging)	<b>Past w/Intervention = .25 1-3 days per week = .5 4-6 days per week = .75 Daily = 1</b>	X	<b>Past-w/intervention = 4 Easily Altered = 4 Not Easily Altered = 5</b>	<b>Total of Weight x Value</b>
Wanders and is exit seeking: moving about with no apparent purpose and tries to leave the residence or facility	<b>Past w/Intervention = .25 1-3 days per week = .5 4-6 days per week = .75 Daily = 1</b>	X	<b>Past-w/intervention = 4 Easily Altered = 4 Not Easily Altered = 5</b>	<b>Total of Weight x Value</b>
Sexual acting out	<b>Past w/Intervention = .25 1-3 days per week = .5 4-6 days per week = .75 Daily = 1</b>	X	<b>Past-w/intervention = 4 Easily Altered = 4 Not Easily Altered = 5</b>	<b>Total of Weight x Value</b>
Intimidating/threatening (No physical contact)	<b>Past w/Intervention = .25 1-3 days per week = .5 4-6 days per week = .75 Daily = 1</b>	X	<b>Past-w/intervention = 4 Easily Altered = 4 Not Easily Altered = 5</b>	<b>Total of Weight x Value</b>
Assaultive (requires physical contact)	<b>Past w/Intervention = .25 1-3 days per week = .5 4-6 days per week = .75 Daily = 1</b>	X	<b>Past-w/intervention = 4 Easily Altered = 4 Not Easily Altered = 5</b>	<b>Total of Weight x Value</b>
Breaks, throws items	<b>Past w/Intervention = .25 1-3 days per week = .5 4-6 days per week = .75 Daily = 1</b>	X	<b>Past-w/intervention = 4 Easily Altered = 4 Not Easily Altered = 5</b>	<b>Total of Weight x Value</b>
The maximum number of points you can have in Category Four is 10.				Add scores from above columns for Category Four Score EXCEPT score cannot be more than 10
Category Five				
Fire setting	<b>Past w/Intervention = .25 1-3 days per week = .5 4-6 days per week = .75 Daily = 1</b>	X	<b>Past-w/intervention = 5 Easily Altered = 5 Not Easily Altered = 6</b>	<b>Total of Weight x Value</b>

Combative during care	<b>Past w/Intervention = .25</b> 1-3 days per week = .5 4-6 days per week = .75 Daily = 1	X	<b>Past-w/intervention = 5</b> Easily Altered = 5 Not Easily Altered = 6	<b>Total of Weight x Value</b>
Eats nonedible substances	<b>Past w/Intervention = .25</b> 1-3 days per week = .5 4-6 days per week = .75 Daily = 1	X	<b>Past-w/intervention = 5</b> Easily Altered = 5 Not Easily Altered = 6	<b>Total of Weight x Value</b>
Seeks vulnerable sexual partners	<b>Past w/Intervention = .25</b> 1-3 days per week = .5 4-6 days per week = .75 Daily = 1	X	<b>Past-w/intervention = 5</b> Easily Altered = 5 Not Easily Altered = 6	<b>Total of Weight x Value</b>
The maximum number of points you can have in Category Five is 12.				Add scores from above columns for Category Five Score EXCEPT score cannot be more than 12

## Cognitive Performance Score:

Your Cognitive Performance Score (CPS) is based on the following things. In most cases, we look at how well you:

- Communicate;
- Make decisions; and
- Remember recent events.

We also look at two other things:

- Are you in a coma?
- Are you unable to make decisions and feed yourself?

### Communication:

We score how well you tell the people closest to you what you need or want, opinions, urgent problems, and social conversation. You might talk, write, sign, type, or use other ways to communicate. We describe how well you communicate below.

- **Understood:** You express ideas clearly.

- **Usually understood:** You have a hard time finding the right words or finishing thoughts. This makes you slow to respond or you need some prompting to be understood.
- **Sometimes understood:** You are only able to express very basic needs like food, drink, sleep, or toilet.
- **Rarely/never understood:** If you can be understood at all, a caregiver must interpret specific sounds or body language. Examples are how you express hunger, pain, or need to toilet.

#### **Special Information about Children and Communication:**

Children are automatically considered at the same level as Understood until their 3rd birthday.

#### **Decision making:**

We score how you can and do make everyday decisions about tasks or Activities of Daily Living. Based on decisions you made in the seven days before your assessment, we assess whether you were:

- **Independent:** Your decisions about your daily routine are consistent and planned. Those decisions reflect your lifestyle, choices, culture, and values.
- **Difficulty in new situations:** Your daily routine is planned. You are able to make decisions in familiar situations, but you have trouble making decisions in new situations or when faced with new tasks.
- **Poor decisions/unaware of consequences:** Your decisions are poor. You need reminders, cues, and supervision in planning, organizing and correcting daily routines. You may attempt to make decisions, but do it poorly.
- **No/few decisions:** Even if reminded, your ability to make decisions is severely impaired. You never or rarely make decisions.
- **Comatose:** You are in a coma or persistent vegetative state.

### **Special Information about Children and Decision Making:**

Children are automatically considered at the same level as Independent until their 12th birthday.

**Short Term Memory:** We assess how well you remember things that happened recently.

- **Short-Term Memory problem:** We assess this in two different ways.
  - You have problems remembering things that happened recently. It's more than just common forgetfulness.
  - Most people are asked to remember and then repeat 3 words. You have Delayed Recall if you couldn't remember one or more of the words.

### **Special Information about Children and Short-Term Memory:**

Children are automatically considered at the same level as No Problem until their 12th birthday.

Here is a link to the rule that deals with Cognitive Performance Score.

<http://apps.leg.wa.gov/wac/default.aspx?cite=388-106-0090>

### **Clinical Complexity:**

Clinical Complexity includes a variety of medical conditions and/or care needs. The Key below lists all of those medical conditions and care needs. At least one condition or care need must be present along with its minimum ADL score to qualify. For example, a diagnosis of ALS with an ADL score of 10 will not qualify for Clinical Complexity.

Condition or Care Need	ADL score
ALS (Lou Gehrig's Disease)	15 or more
Aphasia (expressive and/or receptive)	2 or more
Bowel Program: A regular, ongoing program that may include interventions other than oral medications such as digital stimulation,	11 or more

<b>Condition or Care Need</b>	<b>ADL score</b>
over the counter suppositories or enemas.	
<b>Burn(s)</b> and one or more of the following:	
<b>Application of dressing</b>	2 or more
<b>Wound/skin care:</b> These are measures to treat open skin areas, lesions, or post-operative incisions to promote healing.	
<b>Cerebral Palsy</b>	15 or more
<b>Chronic Obstructive Pulmonary Disease (COPD) &amp; Shortness of Breath (at rest or exertion)</b>	11 or more
<b>Chronic Obstructive Pulmonary Disease (COPD) &amp; dizziness/vertigo</b>	11 or more
<b>Diabetes Mellitus</b> (insulin dependent)	15 or more
<b>Diabetes Mellitus</b> (noninsulin dependent)	15 or more
<b>Dialysis</b>	11 or more
<b>Edema</b> (Swelling from accumulation of fluid in the tissue)	15 or more
<b>Emphysema &amp; Shortness of Breath</b> (at rest or exertion)	11 or more
<b>Emphysema &amp; dizziness/vertigo</b>	11 or more
<b>Explicit terminal prognosis</b> (less than six months to live)	15 or more
<b>Hemiplegia</b> (paralysis of one side of the body)	15 or more

Condition or Care Need	ADL score
<b>Hospice care</b>	15 or more
<b>Injections</b>	15 or more
<b>Intravenous medications</b>	11 or more
<p><b>Bladder: Frequently incontinent</b> means you tend to leak urine or cannot control urination every day.</p> <p><b>Bladder: Almost always incontinent</b> means you leak urine or cannot control urination several times every day.</p> <p><b>Bowel: Frequently incontinent</b> means you leak stool or cannot control your bowel 2 or 3 times per week.</p> <p><b>Bowel: Almost always incontinent</b> means you leak stool or cannot control your bowel almost all the time.</p> <p><u>And</u></p> <p><b>You use and need help with pads or briefs, with cleaning, or with an external catheter or ostomy. You leak stool or urine onto your skin; or</b></p> <p><b>You do not use pads or briefs, have an ostomy, or external catheter. You leak stool or urine onto your skin; or</b></p>	11 or more

Condition or Care Need	ADL score
<b>You use a scheduled toileting plan</b> which means your caregiver takes you to toilet, gives you a urinal, or reminds you to toilet at scheduled times. It can include training you to go or getting you to go based on cues.	
<b>Management of IV lines</b>	11 or more
<b>Multiple Sclerosis</b>	15 or more
<p data-bbox="208 671 1230 1036"><b>You need IV Nutritional Support or Tube Feedings; <u>and</u></b>             Your total calories received by IV or tube was at least 25%; <u>and</u>             Your fluid intake by IV or tube is greater than 2 cups per day.</p>	2 or more
<b>Oxygen via mask or canula</b>	11 or more
<b>Ostomy care</b>	2 or more
<b>Pain daily</b> means you experience some amount of pain every day.	15 or more
<b>Parkinson's</b>	15 or more
<b>A passive range of motion program</b> is designed by a professional (nurse or therapist). The program maintains flexibility and useful motion in the joints of the body.	11 or more
<b>Pathological bone fracture</b>	15 or more
<b>Quadriplegia</b> (paralysis of all legs and arms)	15 or more
<b>Radiation therapy or a radiation implant</b>	11 or more

Condition or Care Need	ADL score
<b>Rheumatoid Arthritis</b>	15 or more
You have a <b>current swallowing problem</b> <u>and</u> you need help eating.	11 or more
<p><b>Pressure ulcers</b> (bed sores) with:</p> <p><b>An area or areas of persistent skin redness</b> (without a break in the skin) that does not disappear when pressure is relieved over a pressure point; or</p> <p><b>Partial loss of skin layers</b> in one or more places on your body that looks like an abrasion, blister, or shallow crater over a pressure point; or</p> <p><b>Full thickness of skin lost</b> over a pressure point that looks like a deep crater. You may see muscle or bone.</p>	
<p><u>OR</u></p> <p><b>Skin desensitized to pain and/or pressure:</b> You are unable to feel pain or pressure in one or more places on your body.</p>	2 or more
<p><u>OR</u></p> <p><b>Open lesion(s):</b> An open lesion is an abscess or other skin sore. It does not include ulcers, rashes, or cuts.</p> <p><u>OR</u></p> <p><b>Stasis (venous) ulcers:</b> Stasis or venous ulcers are skin ulcers on a part of the body with impaired circulation. The ulcer may be open or closed. It is commonly found on the lower leg or ankle.</p> <p><u>AND</u></p> <p><b>Ulcer care</b> which includes any intervention for treating an ulcer at any</p>	

Condition or Care Need	ADL score
<ul style="list-style-type: none"> <li>ulcer stage; or</li> <li><b>Pressure relieving device</b> which includes gel, air, or other cushioning for chairs and air fluidized mattress, low air-loss therapy beds, flotation and water or bubble mattresses; or</li> <li><b>Turning and/or repositioning program:</b> A continuous and consistent program for changing your body's position to prevent skin breakdown; or</li> <li><b>Application of dressing;</b> or</li> <li><b>Wound / skin care:</b> These are measures to treat open skin areas, lesions, or post-operative incisions to promote healing.</li> </ul>	
<b>Suction treatment</b>	2 or more
<b>Tracheostomy care</b>	11 or more
<b>Ventilator or respirator</b>	11 or more
<b>Walking training:</b> This training is designed and monitored by a professional (nurse or therapist) for rehabilitation or restorative purposes. Your caregiver does the training at least 15 minutes every day.	11 or more

### Exceptional Care:

Exceptional Care is a category of care that requires a combination of specific care needs. There are two ways to qualify for Exceptional Care.

#### Qualifying under Method #1:

You must meet all four of the criteria listed below to qualify.

1. An ADL score of 22 or greater; and

2. The need for a Turning/Repositioning program; and
3. Qualifying treatments, appliances, and specific help you need related to toileting; and
4. The need for a Range of Motion program provided by a qualified DSHS-paid provider.

The Table below lists requirements 2-4 in more detail.

- |   |
|---|
| <p><b>2. Turning and/or repositioning program:</b> A continuous and consistent program for changing your body's position to prevent skin breakdown (bed sores).</p> <p><b>3. Qualifying treatments, appliances, or specific help you need related to toileting.</b></p> <p><b>Must include one or more of the following:</b></p> <ul style="list-style-type: none"><li>• External catheter</li><li>• Intermittent catheter</li><li>• Indwelling catheter</li><li>• Bowel program: A regular, ongoing program that may include interventions other than oral medications such as digital stimulation, over the counter suppositories or enemas.</li><li>• Ostomy care</li><li>• Total dependence means you weren't able to do anything relating to toileting. You weren't able to get on and off the toilet, bedside commode or bed pan. You can't wipe or cleanse yourself, change pads or briefs, or adjust clothing. If you do not use a toilet, you are totally dependent on someone for help using a catheter, colostomy, commode, or urinal.</li></ul> |
|---|

4. **Range of motion program:** A range of motion program is designed by a professional (nurse or therapist). The program maintains flexibility and useful motion in the joints of the body. There are two kinds of range of motion programs.

**Active range of motion program:** These are exercises you perform to maintain your joint function. You may need help with cueing or reminders by a caregiver.

or

**Passive range of motion program (you must be older than 3 years of age):** You are unable to move a joint and you need a caregiver to perform maintenance movements for each joint.

If you live at home, a range of motion program must be provided by: Individual provider (IP), Agency provider, Private duty nursing, or Self-directed care (IP only). If you live in a residential setting, it must be provided by: Adult Family Home/Boarding home staff, facility RN/LPN, facility staff, or private duty nursing.

## **Qualifying under Method #2:**

You must meet all five of the criteria listed below to qualify.

1. An ADL score of 22 or greater; and
2. The need for a Turning/Repositioning program; and
3. The need for a Range of Motion program provided by a qualified DSHS-paid provider; and
4. IV Nutrition Support or Tube feeding where total calories received per IV or tube was greater than 50% and fluid intake by IV or tube is greater than 2 cups; and
5. The need for Dialysis or Ventilator/Respirator help provided by a qualified DSHS-paid provider.

The Table below lists requirements 2-5 in more detail.

2. **Turning and/or repositioning program:** A continuous and consistent program for changing your body's position to prevent skin breakdown (bed sores).
3. **Range of motion program:** A range of motion program is designed by a professional (nurse or therapist). The program maintains flexibility and useful motion in the joints of the body. There are two kinds of range of motion programs.

**Active range of motion program:** These are exercises to maintain your joint function. You may need help with cueing or reminders by a caregiver.

or

**Passive range of motion program (you must be older than 3 years of age):** You are unable to move a joint and you need a caregiver to perform maintenance movements for each joint.

If you live at home, a range of motion program must be provided by: Individual provider (IP), Agency provider, Private duty nursing, or Self-directed care (IP only). If you live in a residential setting, it must be provided by: Adult Family Home/Boarding home staff, facility RN/LPN, facility staff, or private duty nursing.

**4. Nutritional/fluid support: All three below are required.**

- You need IV nutritional support or tube feedings;
- Your total calories received by IV or tube was at least 50%;
- Your fluid intake by IV or tube is greater than 2 cups per day.

**5. Dialysis or Ventilator/Respirator Support:** You need help using a ventilator or a respirator or with dialysis from a qualified DSHS-paid provider: Individual provider (IP), Agency provider, Private duty nursing, or Self-directed care (IP only).

**Dialysis or Ventilator/Respirator Support:** You need help using a ventilator or a

respirator or with dialysis from a qualified DSHS-paid provider. If you live at home, the help must be provided by: Individual provider (IP), Agency provider, Private duty nursing, or Self-directed care (IP only). If you live in a residential setting, it must be provided by: Adult Family Home/Boarding home staff, facility RN/LPN, facility staff, or private duty nursing.

## **Informal Support:**

Informal support is help you get from a friend, neighbor, or family member. Informal support also includes programs like Adult Day Health or a community resource such as a church group. Except for some programs like Adult Day Health, we don't pay for informal support. If you have informal support, you get fewer hours of paid help when you receive personal care services in your own home. (We don't look at informal support if you are in a residential setting like an Adult Family Home or Boarding Home.) Adjustments for informal supports are based on how much help you have available to help meet your needs.

We use the following terms when discussing informal supports:

- **Met:** When informal supports meet all your needs for help with a task. For example, you are unable to cook meals but your daughter cooks all your meals for you without pay.
- **Partially Met:** When informal supports meet part of your need for help with a task. For example, you are unable to cook meals and a neighbor, who is not paid, brings you dinner 2 times a week.
  - If informal support partially meets your need for help with a task we look to see how often you need help. Then we look at how often the informal support is available:
    - Less than  $\frac{1}{4}$  of the time.
    - $\frac{1}{4}$  to  $\frac{1}{2}$  of the time.
    - $\frac{1}{2}$  to  $\frac{3}{4}$  of the time.

- More than  $\frac{3}{4}$  of the time.
- **Unmet:** You have no help from informal supports. For example, you can't cook for yourself and there isn't anyone who will cook for you.
- **Activity did not occur/client declines:** You need help with an ADL or IADL, but you don't want your paid caregiver or anyone else to help with it. For example, before your assessment, your daughter was visiting from out of town and helped you with toileting. She is leaving now. You don't want help with your toileting from your paid caregiver or anyone else.\*
- **Activity did not occur/client not able:** You are not capable of performing the ADL or IADL. For example, a quadriplegic is not capable of performing the ADL of Walk in Room.
- **Activity did not occur/no provider:** You need help with an ADL or IADL and would have accepted help, but the task did not occur because you did not have a caregiver available to help you. For example, you need help taking a bath three times a week, but your caregiver could not help you with this task because she hurt her back.\*

\* See description in Activities of Daily Living Scoring earlier in this Key.

### **Examples:**

The complete Table for all qualifying ADLs/IADLs is at the end of the Informal Support section. That Table provides the Value Percentages for each qualifying ADL/IADL.

#### **Example #1:**

Ginny is 85 years old. She lives alone in a senior apartment. She gets 47 "base" hours of in-home personal care services per month. Ginny needs help with dressing, taking her medication, bathing, personal hygiene, locomotion outside her apartment, fixing meals, housework, shopping, and getting to her medical appointments.

Ginny's family fixes all her lunches and dinners. They stop by and fix lunch or dinner for her. Sometimes when they can't stop by, Ginny warms up something they've fixed her in advance and left in her refrigerator or freezer. Ginny's paid caregiver fixes Ginny's breakfast.

Ginny receives help from her family who fix 14 of the 21 meals she eats every week. This is  $\frac{2}{3}$  of the meals Ginny eats.  $\frac{2}{3}$  is a fraction between  $\frac{1}{2}$  -  $\frac{3}{4}$ . Ginny's need for help fixing meals is "Partially met"  $\frac{1}{2}$  -  $\frac{3}{4}$  of the time by her family.

All of Ginny's need for help with dressing, taking her medication, bathing, personal hygiene, housework, shopping, and getting to her medical appointments are "Unmet." This is because Ginny doesn't have anyone to help her with these things except her paid caregiver.

Ginny's personal care hours are reduced by 3 hours each month because of her family's help. She doesn't need as much help from her paid caregiver. That calculation is explained below. It is based on DSHS rules.

The qualifying ADLs and IADLs Ginny needs help with are added up first. Not every ADL is a qualifying ADL. Ginny needs help with 4 qualifying ADLs. They are dressing, taking her medication, bathing, and personal hygiene. Ginny's need for help with locomotion outside her apartment is not a qualifying ADL.

Ginny needs help with 4 qualifying IADLs. They are fixing meals, housework, shopping, and getting to her medical appointments.

A DSHS rule assigns a Value Percentage to the amount of help Ginny has available for each qualifying ADL or IADL. The Value Percentage looks at two things:

- Whether there is any informal support assistance for each qualifying ADL/IADL; and
- How much assistance there is, if any.

Here is a Table just about Ginny and her qualifying ADLs/IADLs. Ginny has partial assistance or help available for fixing meals from her family. Ginny doesn't have any assistance or help available (except from her paid caregiver) for anything else.

In the table below, why is "n/a" (not applicable) marked for Assistance Available for everything other than "Fixing meals"? Because Assistance Available is marked only if there is partial assistance available for an ADL/IADL. N/A is marked when:

- there is no assistance available (Unmet);
- total assistance is available (Met);
- the ADL/IADL did not occur because you were not able or you did not have a provider;
- the ADL/IADL did not occur because you declined help with it.

ADLs/IADLs	Status	Assistance Available	Value Percentage
Dressing	Unmet	n/a	1
Help with meds	Unmet	n/a	1
Bathing	Unmet	n/a	1

Personal hygiene	Unmet	n/a	1
Fixing meals	Partially met	$\frac{1}{2} - \frac{3}{4}$ of the time	.1
Housework	Unmet	n/a	1
Shopping	Unmet	n/a	1
Travel to medical appointments	Unmet	n/a	1

Total of Value Percentages = 7.1

Total # of qualifying ADLs/IADLS = 8

Steps 1 and 2 are to add up the total of the Value Percentages and the total number of qualifying ADLs/IADLS. See above.

Step 3 is to divide the Total of the Value Percentages by the number of qualifying ADLs/IADLS. That amount is Value A.  $7.1 \div 8 = .8875$  = Value A. This number is rounded to .89.

Step 4 is to subtract Value A from 1.  $1 - .89 = 0.11$ . This is Value B.

Step 5 is to divide Value B by 3.  $.11 \div 3 = .036$ . This is Value C. This number is rounded to .04.

Step 6 is to add Value A and Value C.  $.89 + .04 = .93$ . This is Value D.

Step 7 is to multiply Value D by Ginny's base hours (which are 47).  $47 \times .93 = 43.71$ . This number is rounded to 44. This is the number of personal care hours Ginny will get each month.

Ginny's base hours will be reduced by 3 hours per month because her family fixes her lunch and dinner. ( $47 - 44 = 3$  fewer hours per month.)

#### **Example #2:**

Sam is 37 years old. He is a paraplegic, uses a wheelchair, and lives with his domestic partner, John. John works outside their home. Sam needs help with bed mobility, transfer, toilet use, dressing, personal hygiene, bathing, fixing meals, housework, and shopping. Because he is paralyzed he is not able to walk. Sam gets 327 "base" hours of in-home personal care services per month.

John fixes Sam's breakfast and lunch on Saturday and Sunday. John fixes Sam's dinner 3 times per week. Sam's caregiver fixes his breakfast and lunch during the week. John works on the other 4 nights so Sam's paid caregiver fixes Sam's dinner on those nights.

Sam receives help from John who fixes 7 of the 21 meals Sam eats every week. This is

1/3 of the meals prepared for Sam. 1/3 is a fraction between  $\frac{1}{4}$  -  $\frac{1}{2}$ . Sam's need for help fixing meals is "Partially met" by John  $\frac{1}{4}$  -  $\frac{1}{2}$  of the time.

John does all of Sam's shopping and housework. Sam's need for help with housework and shopping is "Met."

All of Sam's need for help with bed mobility, transfer, toilet use, dressing, personal hygiene, and bathing are "Unmet." This is because Sam doesn't have anyone to help him with these things except his paid caregiver.

Sam's personal care hours are reduced by 62 hours per month. Because of John's help, Sam doesn't need as much help from his paid caregiver. That calculation is explained below. It is based on DSHS rules.

The qualifying ADLs and IADLs Sam needs help with are added up first. Not every ADL is a qualifying ADL. Sam needs help with 7 qualifying ADLs. They are bed mobility, transfer, toilet use, dressing, personal hygiene, and bathing. Because Sam cannot walk, the ADL "walk in room" is scored as "Did not occur/client not able." Walk in room is also counted as a qualifying ADL.

Sam needs help with 3 qualifying IADLs. They are fixing meals, housework, and shopping.

A DSHS rule assigns a Value Percentage to the amount of help Sam has for each qualifying ADL or IADL. The Value Percentage looks at two things:

- Whether there is any informal support assistance for each qualifying ADL/IADL; and
- How much assistance there is, if any.

Here is a Table just about Sam and his qualifying ADLs/IADLs. Sam has partial assistance or help available for fixing meals. He has full assistance or help for shopping, and housework. Sam doesn't have any assistance or help available (except from his paid caregiver) for anything else.

The Assistance Available for everything but fixing meals is marked n/a (not applicable). In the table below, why is "n/a" marked for Assistance Available for everything else? N/A is marked when:

- there is no assistance available (Unmet);
- total assistance is available (Met);
- the ADL/IADL did not occur because you were not able or you did not have a provider;
- the ADL/IADL did not occur because you declined help with it.

ADLs/IADLs	Status	Assistance Available	Value Percentage
Bed mobility	Unmet	n/a	1
Transfer	Unmet	n/a	1
Walk in room	Did not occur	n/a	1
Toilet use	Unmet	n/a	1
Dressing	Unmet	n/a	1
Personal hygiene	Unmet	n/a	1
Bathing	Unmet	n/a	1
Fixing meals	Partially met	$\frac{1}{4} - \frac{1}{2}$	.2
Shopping	Met	n/a	0
Housework	Met	n/a	0

$$\begin{aligned}\text{Total of Value Percentages} &= 7.2 \\ \text{Total # of qualifying ADLs/IADLS} &= 10\end{aligned}$$

Steps 1 and 2 are to add up the total of the Value Percentages and the total number of qualifying ADLs/IADLs. See above.

Step 3 is to divide the Total of the Value Percentages by the number of qualifying ADLs/IADLs. That amount is Value A.  $7.2 \div 10 = .72$  = Value A.

Step 4 is to subtract Value A from 1.  $1 - .72 = .28$ . This is Value B.

Step 5 is to divide Value B by 3.  $.28 \div 3 = .093$ . This is Value C. It is rounded to .09.

Step 6 is to add Value A and Value C.  $.72 + .09 = .81$ . This is Value D.

Step 7 is to multiply Value D by Sam's base hours (which are 327).  $327 \times .81 = 264.87$ . This number is rounded to 265. This is number of personal care hours Sam will get each month.

Sam's base hours will be reduced by 62 hours per month because John fixes some meals and does all the housework and shopping. ( $327 - 265 = 62$  fewer hours per month.)

### Example #3:

Bob is 75 years old. He lives alone in his manufactured home on some acreage. Bob needs help with dressing, personal hygiene, bathing, fixing meals, housework, and shopping. Bob gets 69 "base" hours of in-home personal care services per month.

Bob's son, Joe, visits him on the weekends. He arrives before Bob goes to bed on Friday and leaves Sunday afternoon. Joe fixes all Bob's meals on Saturday and two of Bob's Sunday meals. Bob's paid caregiver fixes the rest of Bob's meals.

Bob receives help from Joe who fixes 5 of the 21 meals Bob eats every week. This is a little less than  $\frac{1}{4}$  of the meals prepared for Bob. A little less than  $\frac{1}{4}$  of the time is a fraction between 0 -  $\frac{1}{4}$ . Bob's need for help fixing meals is "Partially met" by Joe less than  $\frac{1}{4}$  of the time.

Joe helps Bob with putting on his pajamas on Friday and Saturday night and with getting dressed on Saturday and Sunday mornings. Bob needs help dressing 14 times during the week. Joe helps Bob 4 of those times which is a little over  $\frac{1}{4}$  of the time. A little more than  $\frac{1}{4}$  is a fraction between  $\frac{1}{4}$  -  $\frac{1}{2}$ . Bob's need for help with dressing is "Partially met" by Joe  $\frac{1}{4}$  to  $\frac{1}{2}$  the time.

All of Bob's need for help with personal hygiene, housework, and shopping are "Unmet." This is because Bob doesn't have anyone to help him with these things except his paid caregiver. Although Bob needs help with bathing, he won't accept help from his paid caregiver, Joe, or anyone else.

Bob's personal care hours are reduced by 10 hours each month because of Joe's help and because Bob won't accept help with bathing. That calculation is explained below. It is based on DSHS rules.

The qualifying ADLs and IADLs Bob needs help with are added up first. Not every ADL is a qualifying ADL. Bob needs help with 3 ADLs. They are dressing, personal hygiene, and bathing. But, since Bob won't accept help with bathing, it can't be counted as a qualifying ADL. Bob has 2 qualifying ADLs that are counted.

Bob needs help with 3 qualifying IADLs. They are fixing meals, housework, and shopping.

A DSHS rule assigns a Value Percentage to the amount of help Bob has available for each qualifying ADL or IADL. The Value Percentage looks at 2 things:

- Whether there is any informal support assistance for each qualifying ADL/IADL; and
- How much assistance there is, if any.

Here is a Table just about Bob and his qualifying ADLs/IADLs. Bob has partial assistance or help available for fixing meals and dressing.

The Assistance Available for everything but fixing meals and dressing is marked n/a (not applicable). In the table below, why is "n/a" marked for Assistance Available for

personal hygiene, shopping, housework, and bathing? N/A is marked when:

- there is no assistance available (Unmet);
- total assistance is available (Met);
- the ADL/IADL did not occur because you were not able or you did not have a provider;
- the ADL/IADL did not occur because you declined help with it.

ADLs/IADLs	Status	Assistance Available	Value Percentage
Dressing	Partially met	1/4 - 1/2	.55
Personal hygiene	Unmet	n/a	1
Bathing (not counted)	Decline	n/a	0
Fixing meals	Partially met	less than 1/4	.3
Shopping	Unmet	n/a	1
Housework	Unmet	n/a	1

Total of Value Percentages = 3.85  
 Total # of qualifying ADLs/IADLS = 5

Steps 1 and 2 are to add up the total of the Value Percentages and the total number of qualifying ADLs/IADLs. See above.

Step 3 is to divide the Total of the Value Percentages by the number of qualifying ADLs/IADLs. That amount is Value A.  $3.85 \div 5 = .77$  = Value A.

Step 4 is to subtract Value A from 1.  $1 - .77 = .23$ . This is Value B.

Step 5 is to divide Value B by 3.  $.23 \div 3 = .07666$  which is rounded to .08. This is Value C.

Step 6 is to add Value A and Value C.  $.77 + .08 = .85$ . This is Value D.

Step 7 is to multiply Value D by Bob's base hours (which are 69).  $69 \times 0.85 = 58.65$ . This number is rounded to 59. This is number of personal care hours Bob will get each month.

Bob's base hours will be reduced by 10 hours per month because Joe fixes most weekend meals, helps Bob with dressing on the weekends, and because Bob refuses help with bathing. ( $69 - 59 = 10$  fewer hours per month.)

**Example #4:**

Janet lives with her husband, Bill. Janet is 63 years old. Bill is 65. He still works, but only part time. Janet has multiple sclerosis. She gets 115 “base” hours of in-home personal care services per month. Janet needs help with dressing, bathing, personal hygiene, transfer, locomotion outside her house, fixing meals, housework, shopping, and getting to her medical appointments.

Bill fixes dinner for himself and Janet every night. He also fixes Janet’s breakfast and lunch on the weekends. Janet’s paid caregiver fixes her breakfast and lunch during the week.

Janet receives help from Bill for 11 of the 21 meals she eats every week. This is a little over  $\frac{1}{2}$  of the meals prepared for Janet. A little more than  $\frac{1}{2}$  is a fraction between  $\frac{1}{2} - \frac{3}{4}$ . Janet’s need for help fixing meals is “Partially met” by Bill  $\frac{1}{2} - \frac{3}{4}$  of the time.

Bill helps Janet change into her pajamas every night. Janet’s paid caregiver helps Janet get dressed in the morning. Janet needs help dressing 14 times during the week. Bill is helping Janet with dressing  $\frac{1}{2}$  the time.  $\frac{1}{2}$  the time is a fraction between  $\frac{1}{2} - \frac{3}{4}$ . Janet’s need for help with dressing is “Partially Met” by Bill  $\frac{1}{2} - \frac{3}{4}$  of the time.

Bill helps Janet get up from the couch every night after they watch TV. Janet’s paid caregiver helps Janet get out of bed in the morning during the week. Janet’s paid caregiver also helps Janet get up from the couch on weekdays. Bill helps Janet get out of bed and up from the couch during the day on the weekends. Janet needs help getting out of bed or up from the couch 21 times during the week. Help with getting out of bed or off the couch is a transfer. Bill helps Janet transfer 11 out of 21 times which is a little more than  $\frac{1}{2}$  the time that Janet needs help. A little more than  $\frac{1}{2}$  is a fraction between  $\frac{1}{2} - \frac{3}{4}$ . Janet’s need for help with transfer is “Partially met” by Bill  $\frac{1}{2} - \frac{3}{4}$  of the time.

Bill does the housework and shopping for both of them. Janet’s need for help is “Met” for housework and shopping.

Janet’s paid caregiver provides all the help Janet needs with bathing, personal hygiene, and taking her to medical appointments. Janet typically has a bath 3 times per week. Janet goes to her doctor at least once a month and often, twice a month. In addition, she attends physical therapy once a week. Her paid caregiver takes her to all these appointments. Janet’s need for help with bathing, personal hygiene, and going to medical appointments is “Unmet.”

Janet’s paid caregiver also helps Janet walk safely out to the mailbox during the week.

Janet’s personal care hours are reduced by 39 hours. Because of Bill’s help, Janet doesn’t need as much help from her paid caregiver. That calculation is explained below.

It is based on DSHS rules.

The qualifying ADLs and IADLs Janet needs help with are added up first. Not every ADL is a qualifying ADL. Janet needs help with 4 qualifying ADLs. They are dressing, bathing, personal hygiene, and transfer. Janet's need for help with locomotion outside her house is not a qualifying ADL.

Janet needs help with 4 qualifying IADLs. They are fixing meals, housework, shopping, and getting to her medical appointments.

A DSHS rule assigns a Value Percentage to the amount of help Janet has for each qualifying ADL or IADL. The Value Percentage looks at two things:

- Whether there is any informal support assistance for each qualifying ADL/IADL; and
- How much assistance there is, if any.

Here is a Table just about Janet and her qualifying ADLs/IADLs. Janet has partial assistance or help available for dressing, transfer, and fixing meals from Bill. Janet doesn't have any assistance or help available (except from her paid caregiver) with bathing, personal hygiene, or travel to medical appointments. Janet doesn't need any help from her paid caregiver with housework or shopping.

The Assistance Available for everything but dressing, transfer and fixing meals is marked n/a (not applicable). In the table below, why is "n/a" marked for Assistance Available for everything else? N/A is marked when:

- there is no assistance available (Unmet);
- total assistance is available (Met);
- the ADL/IADL did not occur because you were not able or you did not have a provider;
- the ADL/IADL did not occur because you declined help with it.

ADLs/IADLs	Status	Assistance Available	Value Percentage
Dressing	Partially met	$\frac{1}{2} - \frac{3}{4}$	.35
Bathing	Unmet	n/a	1
Personal hygiene	Unmet	n/a	1
Transfer	Partially met	$\frac{1}{2}$ to $\frac{3}{4}$ of the time	.5
Fixing meals	Partially met	$\frac{1}{2} - \frac{3}{4}$ of the time	.1
Housework	Met	n/a	0

Shopping	Met	n/a	0
Travel to medical appointments	Unmet	n/a	1

Total of Value Percentages = 3.95  
 Total # of qualifying ADLs/IADLS = 8

Steps 1 and 2 are to add up the total of the Value Percentages and the total number of qualifying ADLs/IADLs. See above.

Step 3 is to divide the Total of the Value Percentages by the number of qualifying ADLs/IADLs. That amount is Value A.  $3.95 \div 8 = .49375$  = Value A. This number is rounded to .49.

Step 4 is to subtract Value A from 1.  $1 - .49 = .51$ . This is Value B.

Step 5 is to divide Value B by 3.  $.51 \div 3 = .17$ . This is Value C.

Step 6 is to add Value A and Value C.  $.49 + .17 = .66$ . This is Value D.

Step 7 is to multiply Value D by Janet's base hours (which are 115).  $115 \times .66 = 75.9$ . This number is rounded to 76. This is the number of personal care hours Janet will get each month.

Janet's base hours will be reduced by 39 hours per month because Bill fixes her breakfast and lunch on the weekends, dinner every night, assists with transfers and dressing, and does all the shopping and housework. ( $115 - 76 = 39$  fewer hours per month.)

### Table for Informal Support

Meds	Self Performance	Status	Assistance Available	Value Percentage
Self administration of medications	Rules for all codes apply except independent is not counted	Unmet	N/A	1
		Met	N/A	0
		Decline	N/A	0
		Partially met	<1/4 time	.9
			1/4 to 1/2 time	.7
			1/2 to 3/4 time	.5
			>3/4 time	.3

<b>Unscheduled ADLs</b>	<b>Self Performance</b>	<b>Status</b>	<b>Assistance Available</b>	<b>Value Percentage</b>
Bed mobility, transfer, walk in room, eating, toilet use	Rules apply for all codes except: Did not occur/client not able and Did not occur/no provider = 1;	Unmet	N/A	1
		Met	N/A	0
		Decline	N/A	0
	Did not occur/client declined and independent are not counted.	Partially met	<1/4 time	.9
			1/4 to 1/2 time	.7
			1/2 to 3/4 time	.5
			>3/4 time	.3
<b>Scheduled ADLs</b>	<b>Self Performance</b>	<b>Status</b>	<b>Assistance Available</b>	<b>Value Percentage</b>
Dressing, Personal hygiene, Bathing	Rules apply for all codes except: Did not occur/client not able and Did not occur/no provider = 1;	Unmet	N/A	1
		Met	N/A	0
		Decline	N/A	0
	Did not occur/client declined and independent are not counted.	Partially met	<1/4 time	.75
			1/4 to 1/2 time	.55
			1/2 to 3/4 time	.35
			>3/4 time	.15
<b>IADLs</b>	<b>Self Performance</b>	<b>Status</b>	<b>Assistance Available</b>	<b>Value Percentage</b>
Meal preparation, Ordinary housework, Essential shopping	Rules for all codes apply except independent is not counted.	Unmet	N/A	1
		Met	N/A	0
		Decline	N/A	0
	Partially met		<1/4 time	.3
			1/4 to 1/2 time	.2
			1/2 to 3/4 time	.1
			>3/4 time	.05

IADLs	Self Performance	Status	Assistance Available	Value Percentage
Travel to medical	Rules for all codes apply except independent is not counted.	Unmet	N/A	1
		Met	N/A	0
		Decline	N/A	0
		Partially met	<1/4 time	.9
			1/4 to 1/2 time	.7
			1/2 to 3/4 time	.5
			>3/4 time	.3

Key:

> means greater than

< means less than

### Offsite Laundry, Shopping, & Wood Heat:

When you live at home, adjustments to your hours are made when you have one or more of the following:

- Offsite laundry: You don't have a washer/dryer in your own home. Your paid caregiver must stay with your laundry while it is being washed and dried.
- You live more than 45 minutes from a full service market or a pharmacy.
- Your only source of heat is wood and you need help with tasks like splitting, stacking, or carrying wood.

You may not get as many additional hours when you live more than 45 minutes from a full service market or pharmacy or need wood supply if you get help from informal supports. (Informal Supports do not affect hours for offsite laundry.) Help you get from a friend, neighbor, or family member is called informal support. Informal support also includes community resources such as church groups. We don't pay for informal support. We use the following terms when discussing informal supports:

- **Met:** When informal supports meet all your needs for help with a task. For example, you can't do your shopping and you live more than 45 minutes from a full service market. Your daughter, who is not paid, does all your shopping.

- **Partially Met:** When informal supports meet part of your need for help with a task. For example, the nearest pharmacy is more than 45 miles away. You cannot drive. Your neighbor, who is not paid, takes you twice a month but you have to go weekly.
  - If your need for help with a task is partially met by an informal support we look to see how often help is needed. Then we look at how often the informal support is available to meet this need:
    - Less than  $\frac{1}{4}$  of the time (Note: no reduction is made when you live more than 45 minutes from a full service market or pharmacy or with wood supply so long as you only have informal support less than  $\frac{1}{4}$  of the time with these.);
    - $\frac{1}{4}$  to  $\frac{1}{2}$  of the time;
    - $\frac{1}{2}$  to  $\frac{3}{4}$  of the time;
    - More than  $\frac{3}{4}$  of the time.
- **Unmet:** There are no informal supports. For example, you can't do your shopping and there isn't anyone who will shop for you.
- **Client Declines:** This means that you do not want help with shopping or wood supply.

### **Examples:**

**Note:** A link to the rule that deals with Offsite Laundry, Shopping, and Wood Heat is after the last example.

### **Example #1:**

Jamie is 42 years old. She lives alone in a small older home that is heated only by an old wood stove. Jamie has rheumatoid arthritis and breathing problems from asthma. She can't do what's necessary to keep her home heated. She needs her paid caregiver to help split, stack, and carry wood. Jamie gets 158 hours of in-home personal care services per month.

Jamie has no help with wood heat from friends, neighbors, family members, or

community resource such as a church group. Her need for help with wood heat is "Unmet" by informal supports. Because wood is her only source of heat, she gets more hours so her paid caregiver can help with this.

Here is a Table just about Jamie and her need for assistance with wood heat. Assistance Available in the third column is marked N/A because Jamie doesn't have any informal support available to help with wood heat.

Living condition	Status	Assistance Available	Add On Hours
Wood supply used as sole source of heat	Unmet	n/a	8

Hours = 158  
Add On Hours = 8

Jamie's hours will be increased by 8 hours per month because she needs assistance with heating her home with wood. ( $158 + 8 = 166$  hours per month.)

#### **Example #2:**

Clara is 85 years old. She used to live in an older apartment building that did not have a washer or dryer in the building. Her paid caregiver had to take her laundry to the nearby laundromat and stay with the laundry until it was done. Clara had 65 hours per month and 8 hours were added to that because she had offsite laundry. Clara received a total of 73 hours per month.  $65 + 8 = 73$ .

Clara recently moved closer to her daughter's home and her new home has a washer and dryer. Clara had her annual assessment not long after she moved. Nothing in her assessment changed except her paid caregiver no longer has to go to the laundromat and stay with Clara's laundry. Clara is no longer eligible for the 8 hours for offsite laundry. Clara gets 65 hours per month. She won't get the 8 additional hours.

#### **Example #3:**

Scott is a 64 year old client that lives in a very rural area. It is more than 45 minutes from his house to a full service market or pharmacy. He lives in an old home that is heated solely by a wood stove. Scott lives alone and enjoys his time out in the country. He gets 111 hours of in-home personal care services per month.

Scott's son, Ben, comes by twice a week to visit. When he visits, he splits enough wood for two days. Wood needs to be brought in, too. Scott's house is small so Ben can only bring in enough wood for 2 days. Scott's paid caregiver splits wood 3 times per week. He also brings in enough to last for 2 days, 3 times a week. Scott needs wood split and carried in 4 times per week. Ben helps one of these 4 times which is  $\frac{1}{4}$  of the time.  $\frac{1}{4}$  is a fraction that falls between  $\frac{1}{4}$  and  $\frac{1}{2}$ . Scott's need for help with wood heat is "Partially met"  $\frac{1}{4}$  to  $\frac{1}{2}$  of the time. Instead of getting 8 additional hours per month because he has only wood heat, Scott will get 6 additional hours per month because of Ben's help.

Scott needs help with shopping so his paid caregiver does his shopping. Scott will get an additional 5 hours per month for this because he lives more than 45 minutes from a full service market or a pharmacy. Scott's need for help with distant shopping is "Unmet."

Here is a Table just about Scott and the adjustments made to his hours for living more than 45 minutes from a full service market or pharmacy and wood heat. Assistance Available is marked N/A for living more than 45 minutes from essential shopping because Scott doesn't have any informal support with this.

Living condition	Status	Assistance Available	Add On Hours
Client is more than 45 minutes from essential shopping (which means he/she lives more than 45 minutes one-way from a full service market).	Unmet	n/a	5
Wood supply used as sole source of heat	Partially met	Between $\frac{1}{2}$ and $\frac{3}{4}$ of the time	4

Scott's hours will be increased by 9 hours per month. ( $111 + 9 = 120$  hours per month.)

<http://apps.leg.wa.gov/wac/default.aspx?cite=388-106-0130>