

CA/PS ASSESSMENT COMMENT EXAMPLES

Why is there a need?

- Be specific. It may not be necessary to describe this in each ADL/IADL, however the “why” needs to be clear in the assessment, synopsis, diagnosis tab, etc. For Cognition, an example of “why” the need exists should be documented.
- Give the symptoms and the need, not the diagnosis.

How frequent is the need?

- Be specific. Words or phrases such as “occasionally”, “at times”, or “on a bad day” are not specific enough.

How is the assistance being received?

- Describe what the provider is doing instead of just stating the assist type.

Documenting Cognition:

- Provide an example of the need that times to their health and safety.
- Explain how the provider is assisting the individual with the above example.
- Describe the frequency required to support the assist level selected.

Documenting Re-assessments:

- Answer the three questions above; and
- Address any changes from the previous assessment.
 - What changed?
 - How did it change?
 - Why did it change?

Documenting conflicting statements:

- It is important to document what the consumer reports as their care needs. However, your assessment should reflect their actual needs as determined by gathering additional information from resources such as medial records, collateral contacts, observations and caregivers.

Ambulation Comment Examples:

◆ Minimal Assist

Carol lives in an apartment on her own and states that when inside of her apartment she can get around on her own since she is able to walk shorter distances unassisted. However, when walking outside she always uses a 4-wheeled walker and requires her caregiver to assist her by lifting her walker on uneven terrain such as curbs and stairs. Carol states that without the assistance of her caregiver she would not be able to lift her walker to continue walking due to pain and weakness of neuropathy. Carol states that

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when she gets tired she is able to sit and rest on the seat of her walker. Carol goes shopping and to medical appointments twice a week on average.

◆ **Substantial Assist**

Shirley and facility staff state that she gets extremely tired and weak causing her to be unsteady on her feet following her dialysis treatments, which she receives 3 days a week. By the end of the day following each dialysis treatment, even with the use of her walker, staff must walk beside her and steady her using a gait belt when going to and from the dining room. Shirley reports she attempted to walk to the dining room on her own 3 weeks ago, when she fell and was taken to the hospital with a broken wrist. She has not attempted to walk unassisted following a treatment since then. Shirley does not want to use a wheelchair, fearful that she will become dependent on it.

◆ **Full Assist**

Bob has late stage MS and is no longer ambulatory on his own. His caregiver must push him in his wheelchair each time throughout the component due to persistent issues with dexterity, coordination and weakness. He is unable to manage any part of the component on his own without hands on assistance every time. Bob is unable to use a power chair due to inability to use the joy stick.

Transfer Comment Examples:

◆ **Assist**

Larry needs assistance transferring to/from his bed to his wheelchair and to/from his wheelchair to his lounge chair due to lower body weakness, pain, and poor balance caused from dialysis. His provider uses a gait belt to help him rise from his bed and wheelchair each day. Larry states he is able to transfer on his own in the toileting area where he has grab bars. Without a caregiver to assist him with these transfers, he would not be able to manage on his own.

◆ **Full Assist**

Lois is a person with quadriplegia, is non-weight bearing and is not able to participate in any part of the transfer process. Her caregiver is unable to lift her and must use a Hoyer lift each time to get her safely from her bed to her wheelchair and vice versa. This task is

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required at least 6 times per day and takes approximately 15 minutes each time, which includes transferring to/from the toileting area when having a bowel movement.

Eating Comment Examples:

◆ **Minimal Assist**

Jane likes to manage as much as she can on her own, however she does not have the strength or dexterity due to Parkinson's Disease to finish meals on her own during the week. Her caregiver must physically feed her when this occurs, and she is feeling especially weak about twice a week. If the caregiver were not there to feed Jane, she would be unable to complete the meal on those days.

◆ **Substantial Assist**

Julie lives in an Adult Foster Home and requires one-on-one assistance at all times for each meal. Due to poor cognition from Dementia, Julie requires a caregiver to cue her throughout each meal and without the cueing she would not know what to do and the task would cease. Julie is able to use a special spoon and is able to feed herself. Caregiver states that she sits with Julie for each meal and cues Julie to direct her through each step of every meal. (pick up spoon, dip in soup, bring to mouth, swallow, etc.) but does not need to provide any hands-on assistance.

◆ **Full Assist**

Jerry always requires one-on-one direct feeding due to cognitive impairments. Even with attempts at cueing, Jerry does not respond appropriately requiring his caregiver to physically feed him each time. Jerry also has choking issues and the caregiver has to swipe his throat to remove food at least once every 2-3 days. Without the direct feeding, Jerry would be unable to eat on his own.

Bladder Care Comment Examples:

◆ **Assist**

Carol has a catheter which she can manage partly on her own. Due to contracted hands, when the line gets twisted or kinked she is unable to correct it independently, in addition to the insertion of the catheter when being changed or cleaned. Her caregiver must change and clean her catheter line at least once every other day. Carol is able to walk to the bathroom to dump her catheter bag each time.

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◆ Full Assist

Gert is a person with quadriplegia and has a urinary stoma which she is unable to manage any part of. Her caregiver must change, clean the stoma site, and dump the bag several times a day.

Bowel Comment Examples:

◆ Assist

Due to Charlie's history of bowel blockage which typically occurs 1-2 times a week an enema is required. His caregiver must complete the enema due to pain and limited range of motion from osteoarthritis. The other days a week, he is able to clear his bowels without help. Prior to receiving these weekly enemas, Charlie has suffered severe pain due to the blockage, has been hospitalized and has required surgery to unblock his intestine.

◆ Full Assist

Due to paralysis, Susan uses an ostomy for her daily bowel needs. Susan has no range of motion or strength to complete the component of bowel care, requiring the caregiver to perform all tasks including emptying, cleansing the affected area (stoma) and changing the ostomy bag. The task must be done twice a day and takes the caregiver about 10 minutes each time.

Toileting Comment Examples:

◆ Assist

Due to back pain and rotator cuff limitations, Penelope's caregiver needs to cleanse and wipe her perineal area after each bowel movement (at least once a day). She is able to cleanse herself following bladder elimination and manages the other tasks of toileting independently. Penelope has developed open skin sores prior to receiving a caregiver's assistance.

◆ Full Assist

Bob has muscle weakness throughout his body due to myofibril myopathy. Due to this weakness, his caregiver must cleanse and adjust his clothing each time due to his muscle weakness. Task takes approximately 30 minutes each time, six times a day. In addition,

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when Bob has accidents, he is unable to change or manage his incontinence supplies without his caregiver's assistance.

Self-Preservation Comment Examples:

◆ **Minimal Assist**

Ben requires monitoring and redirection at least once a week when he leaves for medical appointments or running errands, due to confusion when in the community and has in the past been unable to find his way home. Ben has been picked up by the police for wandering on a busy road near his home. This need does not occur daily, because Ben is oriented to his home. Although, family members are concerned that he may need more supervision at home in the future.

◆ **Substantial Assist**

Janet requires monitoring, redirecting and support on a daily basis to safely prepare meals and with understanding how to manage her diabetic needs, as she does not comprehend these needs due to confusion from her dementia. In the past Janet has left the stove on and used the microwave with metal inside resulting in the fire department being contacted. Her family has turned off the gas to the stove and unplugged the microwave to prevent further issues. Janet's caregiver prepares her meals for her offsite to avoid potential behaviors.

◆ **Full Assist**

John has advanced dementia and is living with family. John no longer understands he needs to eat, drink, or bathe. He no longer identifies he has urinated or that he has had a bowel movement. Everyday his care providers must feed him, provide him with water and cue him through drinking (put the straw in your mouth, sip, swallow). Even with cueing John no longer can follow the steps to clean after elimination. The care providers assist John to his bed after he goes to the bathroom and change his undergarments and clean him. John is still able to walk and throughout the day and night will attempt to go into the kitchen where he will attempt to turn on the stove or use the knives; because of this, he is unable to be left alone. The care providers must redirect John to other activities throughout the day and evening. Without constant intervention, John would not eat or drink, would not change his soiled incontinence supplies, and would likely harm himself with kitchen knives or appliances.

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Decision-Making Comment Examples:

◆ **Minimal Assist**

Prior to moving into the Adult Foster Home, Phillip was living alone in his own apartment. He did not comprehend the steps needed to pay his bills or how to determine what he needs to buy at the store. His physician diagnosed him with early onset of Alzheimer's Disease. Phillip can make basic day-to-day decisions, such as managing his personal hygiene needs, dressing and eating at appropriate times. Phillip's family manages his finances throughout the month to ensure electricity, gas and water are all paid.

◆ **Substantial Assist**

Sally requires daily monitoring and redirection from her caregiver due to complications from a TBI to ensure that she is completing her daily ADL routines. To do this, the caregiver comes to Sally's home each day and monitors to ensure that she has eaten appropriately, taken her medication, dressed appropriately, and has completed any other necessary daily tasks. Sally requires cueing throughout the day to complete ADL and IADL tasks. She can be left alone when she is not needing to complete any of her daily tasks. Previously, when Sally did not receive this level of care, she was hospitalized due to malnutrition and infection from not cleansing an open wound.

◆ **Full Assist**

Tony requires assistance throughout each day and can rarely be left alone for any length of time. He will wear inappropriate clothing, will not eat and will not change his incontinence supplies. He cannot be left alone, as he puts whatever he sees in his mouth, and has choked on items. Prior to moving to the facility, he was found in his home where he lived alone, in his soiled underwear and no other clothing. Tony does not understand the necessary steps for any of his basic health and safety needs. Staff report that Tony continually removes his clothing when left alone and must be cued to eat. He must also be cued to change his incontinence supplies every two hours as he will not change them on his own.

Ability to Make Self Understood Comment Examples:

◆ **Minimal Assist**

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Margaret is at the beginning stages of Alzheimer's Disease and there are multiple days throughout the month when she is unable to effectively or easily communicate her needs to her caregiver. When this occurs, her caregiver begins going through her checklist of Margaret's known needs such as incontinence supplies, when she last ate, or if she has taken her pain medication. During these times if her caregiver is not there to monitor and support her she would not complete these tasks. Without supports, Margaret lost a significant amount of weight in three months. With care, she is maintaining a healthy weight.

◆ **Substantial Assist**

Sal has an acquired brain injury caused by prolonged mismanagement of diabetes and is unable to tell his caregiver when he is hungry or when he needs pain medication. His caregiver must monitor Sal by interpreting sounds, facial expressions and body movement to determine what Sal needs. His caregiver is there each day to ensure his medications are taken appropriately and that he gets a minimum of three meals throughout the day. Sal has struggled to communicate with providers in the past resulting in mismanagement of his medication and poor nutrition.

◆ **Full Assist**

Martha has dementia and is no longer able to formulate words or sentences in a manner that communicates her needs. Martha is also in nearly constant pain due to ongoing almost constant muscle spasms and contractions. Providers must interpret Martha's needs related to pain management, medication, repositioning, eating, toileting, etc. constantly. If left alone Martha's blood pressure sky rockets and providers must act immediately. This is generally addressed through training with new providers and is part of the care plan, however it has happened several times in the past including the last time a new HCW started six months ago.

Challenging Behaviors Comment Examples:

◆ **Minimal Assist**

Bill has Huntington's Disease and has a history of becoming agitated and tries to bite when a caregiver attempts to bathe him. The facility has a care plan in place to bathe him twice a week, per his preference. Bill needs to be redirected and reassured by the

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provider that he is in a safe space and no one is there to harm him. After about 15 minutes, Bill is usually able to go through the tasks with the provider.

◆ **Substantial Assist**

Facility staff report that Tim can be very disruptive during the evening meal. He is a person with sundowners and doesn't understand consequences of choices or behaviors. If another resident is sitting at a table where he wants to sit he becomes verbally and physically aggressive and loud, until the other resident leaves. He has gotten into physical altercations with other residents resulting in one person being taken to the hospital with a concussion. Staff get him refocused by redirecting him to eat his meal and reminding him that his favorite T.V. show is on after dinner.

◆ **Full Assist**

Kathy constantly talks and yells. Her behavior is directed toward other residents and is unintelligible for the most part. Kathy goes into the kitchen and other resident's rooms and rearranges the area. Her behaviors require her to have her own room as she will otherwise continually agitate other residents. This occurs multiple times daily, and staff are constantly redirecting her by distracting her with her favorite game Skip-Bo. Kathy has unpredictable episodes of physically aggressive behavior, with a history of hitting staff and other residents. Facility staff members have been trained in addressing her behavior. This placement has been stable for 9 months.

Bathing Comment Examples:

◆ **Assist**

Jack requires the provider to physically help him with getting in and out of the shower each time due to muscle weakness in his legs from advanced cancer. Once he is in the shower, he can manage the task himself by sitting on a bath chair. Without provider assistance Jack is unable to manage the task on his own, so he chooses to wipe himself off with a wet wipe on the days his caregiver is not scheduled. Currently his caregiver assists him with this task twice a week.

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◆ Full Assist

Julie is unable to leave her bed and is unable to reach her hair or cleanse herself properly. Her caregiver completes a daily sponge bath to meet this need and uses a small plastic tub for washing her hair three times a week. Daily cleansing takes approximately 10 minutes, but on the days, she needs her hair washed, it takes approximately 25 minutes. This task can be completed with one caregiver. Without the hands-on assistance of her caregiver, Julie would not be able to complete any part of the task.

Personal Hygiene Comment Examples:

◆ Assist

Jackie states that she is able to put her dentures in and take them out. However, due to blindness, she needs the caregiver to adequately clean her dentures for her at least every other day. She reported that she no longer shaves.

◆ Full Assist

Due to physical limitations related to quadriplegia, Lori is not able to shave or participate in her mouth care. She is not able to complete any part of these tasks on her own. Her provider must physically do it for her. The Adult Foster Home (AFH) care plan indicates the need for someone to brush Lori's teeth twice a day and provide shaving each time it is needed.

Dressing Comment Examples:

◆ Assist

Dorothy states staff must take her shoes and ted hose on and off in the morning and in the evening, as she is unable to bend down far enough to manage on her own due to severe back pain, swelling of the feet and tightness of the ted house. She states she usually wears a loose dress and is able to take that on and off on her own each day. Without her caregiver assisting her with her ted hose her feet would become extremely swollen making it difficult for her to walk.

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◆ Full Assist

Provider states that Harley is able to direct his caregivers with which shirt he wants to wear. However, a caregiver must physically dress and undress him each time as he has no physical strength or dexterity to manage on his own. He is unable to participate in any part of the task and without a caregiver the task would not occur. Dressing takes approximately 20 minutes, twice a day and can be managed with one caregiver.

Grooming Comment Examples:

◆ Assist

Marlin is able to trim his own fingernails, but requires hands-on assistance combing his hair and trimming his toe nails. He is unable to clip his toenails because he gets dizzy and falls out of his chair if he bends over. Marlin has severe bursitis in his shoulders and is unable to reach up to manage his hair care. His caregiver trims his toenails every two weeks and combs his hair each morning.

◆ Full Assist

Due to Harry's hands being severely contracted, he is not able to hold the clippers or the comb to complete his hair or nail care. The caregiver will brush his hair daily and trim his nails whenever needed. He is dependent on his caregiver to perform all tasks of the activity every time it is attempted.

Housekeeping Comment Examples:

◆ Assist

Due to the inability to stand for long periods of time and range of motion limitations, Nelson is unable to complete tasks such as vacuuming, throwing out the trash, and putting away the clean dishes. His caregiver must assist with these tasks at least weekly. Nelson is able to manage tasks such as putting some things away and is able to dust his table and side tables while in a seated position.

◆ Full Assist

April reports she is in constant chronic pain and does not have the strength or endurance due to obesity and severe shortness of breath to manage any housekeeping tasks at any time. The provider must complete all housekeeping tasks for her.

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Laundry Comment Examples:

◆ **Assist**

Lisa is able to put clothes away and transfer from the washer to the dryer but needs assistance gathering clothes, loading the washer and folding the clothes due to poor endurance and limited range of motion. Her caregiver helps with laundry tasks three times a week due to incontinence issues.

◆ **Full Assist**

Bill is not able to comprehend how to do the laundry and in which order they should be done. For example, he puts clothes in the dryer then the washer and will not know how to get them dry. He often forgets to put laundry soap in the washer and has on occasion poured bleach into the washer as he thought it was soap. His caregiver does all laundry tasks each time it is needed, which is about every other day. Bill will hold pieces of laundry and set them down, as he does not understand what to do with them.

Meal Preparation Comment Examples:

◆ **Minimal Assist**

Rose states that if her caregiver leaves premade or prepackaged food items open and on the table for her, then she is able to grab the food and warm it up using either the toaster or the microwave oven. However, the caregiver must open the packaging for Rose. Without the packages being opened and within her reach at the table, Rose would not be able to manage getting them out of the package due to pain, contracted hands and poor balance.

◆ **Substantial Assist**

Larry is unable to reach most kitchen utensils and appliances from his wheelchair; however, he is able to prepare some ingredients if put in front of him at the kitchen table. The provider assists with most of the meal preparation but likes to involve Larry for mixing as he used to love to cook. Caregiver must do all the cutting and cooking at the stove as Larry is unable to use sharp utensils and has a history of leaving the stove on due to poor cognition, resulting in the fire department being called on at least two different occasions.

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◆ Full Assist

Due to Nancy's neuropathy in her lower extremities, which is extremely severe in the morning, she is unable to stand at the counter to prepare breakfast. Also, her hands are severely contracted making it impossible for her to participate. She is dependent on her caregiver to complete all of her meal preparation.

Medication Management Comment Examples:

◆ Minimal Assist

Tom states that he is able to manage most of his medications on his own, but that he has trouble setting up his medications in his medication holder due to his poor vision. He depends on his caregiver to set up his medications once a week; after that he can remember to take them and is able to re-order them when his caregiver tells him they are almost gone.

◆ Substantial Assist

Deanna is able to take her own medications each time without being monitored. She is unable to set them up as she struggles with what to take and when to take them due to cognitive limitations. Her caregiver orders and sets up her medication in a weekly med minder and needs to remind Deanna twice a day to take her medication or she would not even think to take them.

◆ Full Assist

Due to severe cognitive impairment, Derrick does not comprehend the need to take medications, when they need to be ordered, or remember to take them. He depends on his caregivers to set up, administer, and order all of his medications for him. This includes all tasks of medication management.

Shopping Comment Examples:

◆ Minimal Assist

Nancy is able to travel to the grocery store with her caregiver, but she needs to use a motorized scooter to get around the store and is limited to items she can reach. For example, she cannot stand up and lean to get a package of meat from a cooler or sort

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through fruit in a produce display. Her caregiver must grab all items that are not within reach.

◆ **Substantial Assist**

Victor has shortness of breath and pain in his hands and feet from neuropathy. He gets exhausted if he goes to the store and can't participate in any other activities for the rest of the day if he does go. His caregiver shops for him weekly and he is able to put the groceries away in the cupboards and fridge for short periods of time while sitting on his walker.

◆ **Full Assist**

Becky is not able to shop anymore. Due to her aphasia, she is only able to give her caregiver vague ideas of what items she wants purchased, and due to her hemiparesis, she is not able to sit upright in or steer a motorized cart. Also, she is not strong enough to place items into her cart. She cannot manipulate her wallet to pay for groceries, and she cannot place them in her car or store them when she gets home. The caregiver completes all shopping tasks for her.

Transportation Comment Examples:

◆ **Minimal Assist**

Alex is capable of arranging his own transportation and does not need an escort during the ride. However, he needs physical assistance in/out of the vehicle due to poor endurance and severe pain.

◆ **Substantial Assist**

Due to suffering a stroke, Viki is not physically able to get in or out of the car and needs her caregiver to lift her legs and scoot her body in and out. Due to confusion caused by the stroke, she also needs her caregiver to arrange her transportation each time. Once she is securely inside the car she doesn't need assistance from anyone during the ride.

◆ **Full Assist**

Debi is not cognitively able to arrange rides. Due to paralysis, she needs constant repositioning and requires someone to be with her during the ride. She is unable to

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direct where or when her appointment is. Debi also requires someone to physically help her in/out of the vehicle as she uses a wheelchair during the ride.

Long-Term Care Service Priorities for Individuals Served

- ◆ [OAR Chapter 411, Division 015](#)
 - ADLs: 411-015-0006
 - IADLs: 411-015-0007