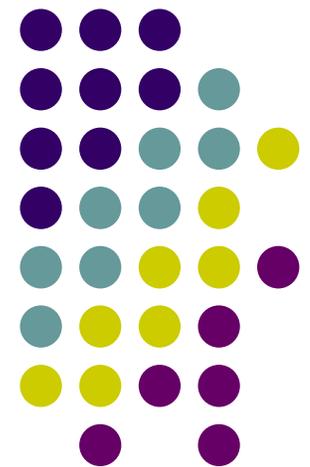


# ***CAPS Versioning***

***Implementation 8-25-14***

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***along with some  
OAR 411-015 amendments  
and clarifications***



***Presented by: Suzy Quinlan***



# Agenda

- ❖ CAPS Assessment
- ❖ CAPS Quick Help
- ❖ SPL policy and rules

# CAPS Assessment Upgrade



- No longer in question format.
- Statement format with rule-based multiple choice selections.
- One screen per ADL & IADL, rather than multiple screens.
- Falls question removed.
- No action needed until next assessment.
- Note: Pending assessments entered prior to close of business , Friday, 8/1/14 will be based on the “question” wizard used prior to this CAPS upgrade.

# Ambulation – Rule-based multiple choice



The screenshot shows a software window titled "Case for [branch : North Salem Disability)". The left sidebar contains a tree view of categories: Client, Four ADLs, Mobility, Eating, Elimination, Cognition/Behavior, Additional ADL/IADL, Sleep, Treatments, Supports, Synopsis, SPL and Needs Summary, and Full Benefit Results. The "Ambulation" item under "Mobility" is selected and highlighted with a blue arrow. A callout box points to this item with the text "No changes to the tree".

The main content area is titled "Ambulation" and contains the following text:

The individual needs **HANDS-ON** assistance from another person in order to ambulate, with or without assistive devices.

**Select the most appropriate answer:**

- A. Independent
- B. Only needs assistance outside the home or care setting.
- C. Needs assistance to get around inside their home or care setting periodically.
- D. ALWAYS needs assistance inside the home or care setting.

A callout box points to the instruction "Select the most appropriate answer:" with the text "Statement Format with multiple choice selection".

Below the list is a horizontal line, and a callout box points to it with the text "Drop-down selection of A B C D".

Below the line is a scrollable area containing a dropdown menu with the letter "C" selected. A callout box points to the dropdown with the text "Scroll down to line at the end".

At the bottom of the window is a "Comments" section with a "Spell Check" button. A callout box points to this section with the text "No change to comments. Continue to enter a comment specific to the individual's ADL/IADL that substantiates the need level. Examples are helpful!".

A "Next" button is located at the bottom right of the window.

# Example of a Quick Help Header



**Ambulation**

**Ambulation** means the activity of moving around both *inside the home or care setting* and outside, during the *assessment time frame* while using *assistive devices*, if needed. Ambulation does not include exercise or physical therapy.

**Assessing Mobility (ambulation and transfer) in general:**

- **Does not** include the following activities: getting in and out of a motor vehicle, getting in or out of a bathtub/shower, moving on or off the toilet, or moving to and from the toilet.
- Inside means inside the entrance to the individual's home or apartment unit or inside the care setting.
- Outside means of courtyards, balconies, patios, porches, walkways, or other areas of the home or apartment unit, the threshold of the door leading outside is considered outside.
- Redbound individuals are full assist in ambulation. Reduce

When line below is not visible, use the scroll bar to view the full screen

C

# Ambulation

\* full screen

## Quick Help Header



**Ambulation** means the activity of moving around both *inside the home or care setting* and outside, during the *assessment time frame* while using *assistive devices*, if needed. Ambulation does not include exercise or physical therapy.

### Assessing Mobility (ambulation and transfer) in general:

- **Does not** include the following activities: getting in and out of a motor vehicle, getting in or out of a bathtub/shower, moving on or off the toilet, or moving to and from the toilet.
- Inside means inside the entrance to the individual's home or apartment unit or inside the care setting.
- Outside means outside the home or care setting, such as courtyards, balconies, stairs, hallways exterior to the doorway of the home or apartment unit, the threshold of the door leading outside is considered outside.
- Bedbound individuals are full assist in ambulation. Reduce ambulation hours in service planning as appropriate.
- Mobility is not solely dependent on falls.
- **Time Frame** means thirty days prior and thirty days following the assessment date and expect the need to be on-going beyond the assessment time frame.

Line shows the end of quick help

# Bedbound with Ambulation



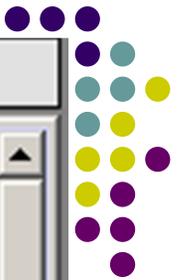
- Previously, assessed as Independent
  - It was thought that if no hands-on assistance was provided for the act of ambulating, due to being bedbound, individuals were considered independent.
- Now, assess as Full Assist
  - A caregiver acts as an extension of the individual when the caregiver ambulates for the purpose of taking care of the individuals needs.
    - ❖ For example: Walk to the dresser to get their clothes or get the person a glass of water.
  - In-home service planning: Hours may be reduced if the individual does not need the maximum assessed hours.

## Transfers

The individual needs **HANDS-ON** assistance from another person to transfer to and from a chair, bed or wheelchair **inside his/her home or care setting**, with or without assistive devices.

**Select the most appropriate answer:**

- A. Independent
  - B. Needs assistance to transfer at least FOUR DAYS during a month.
  - C. ALWAYS needs assistance to transfer.
- 



# Transfers

## Quick Help Header



### Transfers

**Transfer** means the activity of moving to or from a chair, bed or wheelchair using assistive devices, if needed. The assistance must be needed inside the individual's home or care setting.

#### Assessing Transfer:

- Capture the tasks of repositioning an individual in transfers.
- **Time Frame** means thirty days prior and thirty days following the assessment date and expect the need to be on-going beyond the assessment time frame.
- See the Ambulation header for quick help details on Mobility in general.

# OAR 411-015-0006(9) Amended



## Mobility

- Hands-on assistance is now included in the definition of:
  - Ambulation – minimal, substantial and full assist
  - Transfer – assist and full assist
- Purpose: The agency was being overturned through the administrative hearing process without the word “hands-on” in the rule.

# Eating

When eating, the individual needs assistance with feeding and eating with or without the use of assistive devices. (Cutting food up or bringing food to the table is **not** part of Eating. It is considered in Meal Preparation)

## **Select the most appropriate answer:**

A. Independent

B. Needs a person to be immediately available and within sight daily **or** can vary during a one month period if the individual's medical condition fluctuates significantly with:

- Hands-on assistance with feeding, but not always with direct feeding **or**
- Hands-on assistance with special utensils **or**
- Cueing during the act of eating **or**
- Monitoring to prevent choking or aspiration

C. Needs one-on-one assistance for nutritional IV or feeding tube set-up

D. ALWAYS needs one-on-one assistance for:

- Direct feeding **or**
- Constant cueing **or**
- Prevent choking or aspiration when eating

Drop-down selection  
A B C D

C

Line indicates the end  
of information

# Eating Quick Help Header



**Eating**

**Eating** means the activity of feeding and eating.

**Time Frame** means thirty days prior and thirty days following the assessment date and expect the need to be on-going beyond the assessment time frame.

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## Bladder

Needs assistance from another person to accomplish the individual's specific tasks of bladder care, with or without assistive devices, including tasks such as:

- Catheter care;
- Toileting schedule;
- Monitoring for infection;
- Ostomy care;
- Changing incontinence supplies.

Examples of Bladder tasks

### **Select the most appropriate response:**

A. Independent

B. At least MONTHLY, needs assistance to accomplish some of the tasks of bladder care.

C. ALWAYS needs assistance to manage any tasks of bladder or catheter care.

# Bladder Quick Help Header



## Bladder

**Bladder** means managing bladder care. *Dialysis care* needs are not assessed as part of elimination.

**Time Frame** means thirty days prior and thirty days following the assessment date and expect the need to be on-going beyond the assessment time frame.

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## Bowel

Needs assistance from another person to accomplish the individual's specific tasks of bowel care, with or without assistive devices, including tasks such as:

- Digital stimulation;
- Toileting schedule;
- Suppository insertion;
- Ostomy care;
- Enemas;
- Changing incontinence supplies.

Examples of Bowel tasks

### **Select the most appropriate response:**

A. Independent

B. At least MONTHLY, needs assistance to accomplish some of the tasks of bowel care.

C. ALWAYS needs assistance to manage any tasks of bowel care.

# Bowel Quick Help Header



**Bowel**

**Bowel** means managing bowel care.

**Time Frame** means thirty days prior and thirty days following the assessment date and expect the need to be on-going beyond the assessment time frame.

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## Toileting

Needs **HANDS-ON** assistance from another person to accomplish one or more tasks of toileting, with or without assistive devices. Toileting tasks include the following:

- Getting to and from and on and off the toilet (including bedpan, commode or urinal);
- Cleansing after elimination or adjusting clothing;
- Cleaning and maintaining assistive devices, or cleaning the toileting area after elimination because of unsanitary conditions that would pose a health risk. The need must be greater than routine housekeeping. Hands-on assistance does not apply to these tasks.

### **Select the most appropriate response:**

A. Independent

B. At least MONTHLY, needs assistance to accomplish some of the tasks of bowel care.

C. ALWAYS needs assistance with toileting. The assistance must include the tasks in the first 2 bullets.

# OAR 411-015-0006(9) Amended

## Toileting



- Hands-on assistance is now included in the definition of Assist and Full Assist.
  - Of course “hands-on” assistance wouldn’t be used for the tasks associated with cleaning devices or the toileting area.
- Purpose: The agency was being overturned through the administrative hearing process without the word “hands-on” in the rule.

# Toileting Quick Help Header



**Toileting**

**Toileting** means the activity of getting to and from, and on and off the toilet (including bedpan, commode or urinal), cleansing after elimination or adjusting clothing, cleaning and maintaining assistive devices, or cleaning the toileting area after elimination because of unsanitary conditions that would pose a health risk.

**Time Frame** means thirty days prior and thirty days following the assessment date and expect the need to be on-going beyond the assessment time frame.

## Adaptation

Adaptation is the ability to respond, cope and adjust to major life changes such as a change in living situation or a loss (such as health, close relationship, pet, divorce or a death). Assess how the individual would function without assistance of another person, a care setting or alternative service resource.

Answer must be based on the functions of the brain and how it affects the cognitive process.

### **Select the most appropriate response:**

A. Independent

B. LESS THAN DAILY, but more than weekly, needs reassurance to cope with or adjust to change.

C. ALWAYS needs daily and ongoing emotional support and reassurance or is unable to adapt to change.

# Adaptation Quick Help Header



## Tips for assessing Adaptation:

- **Time Frame** means thirty days prior and thirty days following the assessment date and expect the need to be on-going beyond the assessment time frame.
- **The assessment time frame may be expanded** when assessing cognition/behavior. History or incidents that are more than 30 days prior to the assessment date may be considered if they negatively impacted health and safety in the past and are likely to re-occur without supports.
- For all 8 areas of cognition, consider the individual's cognitive "ability" to use information.
- Adaptation is **not** someone that has had a loss and is going through the normal grieving process.
- Adaptation is typically someone that cannot functionally adapt, fixates or gets stuck and cannot move on.
- As an example, this could be demonstrated by an individual with dementia and at some point each day she remembers she is not living in her own home any longer, as she is now in a AFH setting. She moved there 3 years ago and still fixates on the loss of her home.

## Awareness

Awareness means the ability to understand basic health and safety needs (such as the need for food, shelter and clothing). Assess how the individual would function without assistance of another person, a care setting or alternative service resource.

Answer must be based on the functions of the brain and how it affects the cognitive process.

### **Select the most appropriate response:**

A. Independent

B. Needs guidance and support to understand basic health and safety needs.

C. ALWAYS needs daily and ongoing intervention due to the individual's inability to understand basic health and safety needs.

# Awareness Quick Help Header

## Tips for assessing Awareness:

- **Time Frame** means thirty days prior and thirty days following the assessment date and expect the need to be on-going beyond the assessment time frame.
- **The assessment time frame may be expanded** when assessing cognition/behavior. History or incidents that are more than 30 days prior to the assessment date may be considered if they negatively impacted health and safety in the past and are likely to re-occur without supports.
- For all 8 areas of cognition, consider the individual's cognitive "ability" to use information.
- For awareness, consider if the person needs assistance to understand their basic needs, such as for food, shelter, and clothing.
- Is the person aware of the need to eat, maintain hydration, use a walker, take medications or wear a coat when going outside?
- Does the person have difficulty **understanding** needs that must be met?
- Does the person have the **ability** to understand the needs?
- For example, a person would be unable to determine the appropriate clothing to wear outside in inclement weather without structure and guidance from another person.



## Judgment

Judgment means decision-making. It is the ability to identify choices and understand the benefits, risks and consequences of those choices. Individuals who lack the ability to understand choices or the potential risks and consequences need assistance in decision-making. Assess how the individual would function without assistance of another person, a care setting or alternative service resource. This **does not** include what others might deem a poor choice.

Answer must be based on the functions of the brain and how it affects the cognitive process.

### **Select the most appropriate response:**

A. Independent

B. At least WEEKLY, the individual needs protection, monitoring and guidance to make decisions.

C. DAILY, the individual's decision require intervention.

# Judgment Quick Help Header

## Tips for assessing Judgment:

- **Time Frame** means thirty days prior and thirty days following the assessment date and expect the need to be on-going beyond the assessment time frame.
- **The assessment time frame may be expanded** when assessing cognition/behavior. History or incidents that are more than 30 days prior to the assessment date may be considered if they negatively impacted health and safety in the past and are likely to re-occur without supports.
- For all 8 areas of cognition, consider the individual's cognitive "ability" to use information.
- Determine if the individual understands the risks and consequences of their decisions. Ask the consumer questions to learn whether the person understands the risks, consequences and likely outcomes of their decisions.
- Judgment is **not** about poor choices if the person understands the risks and consequences of their decision. Eg: someone that smokes, drinks, live in messy houses, stays with someone in a dysfunctional situation, diabetic that eats candy, etc...
- An example of judgment could be an individual that lets a stranger into their home, and the stranger took advantage of him/her by stealing their rent money. In this example the individual did not understand the risk of letting someone into their home, and the consequence of not being able to pay their bills because their rent money was stolen.



## Memory

Memory means the ability to remember and appropriately use current information, impacting the health and safety of the individual. Assess how the individual would function without assistance of another person, *a care setting or alternative service resource.*

Answer must be based on the functions of the brain and how it affects the cognitive process.

**Select the most appropriate response:**

A. Independent

B. Needs REMINDING due to difficulty remembering and using current information.

C. ALWAYS needs assistance BEYOND REMINDING due to the inability to remember or use information.

# Memory

## Quick Help Header

### Tips for assessing Memory:

- **Time Frame** means thirty days prior and thirty days following the assessment date and expect the need to be on-going beyond the assessment time frame.
- **The assessment time frame may be expanded** when assessing cognition/behavior. History or incidents that are more than 30 days prior to the assessment date may be considered if they negatively impacted health and safety in the past and are likely to re-occur without supports.
- For all 8 areas of cognition, consider the individual's cognitive "ability" to use information.
- Tie memory problems back to how it impacts the health and safety of the individual. Forgetting something, even who is in the picture on the wall may be an indicator of memory loss, but does not necessarily impact the health and safety of the person.
- Consider whether it is typical forgetfulness or truly a memory issue.
- A person would be Independent even if the person has memory issues, but has a system in place to assist them with their memory, such as using sticky notes or the calendar to remind them to take their medication or for doctor's appointments.
- Does the person remember to dress appropriately? Impact may be getting sick.
- Does the person remember to pay bills? Impact may be losing their housing for not paying rent.
- A memory example could tie back to health and safety for an individual that doesn't remember to dress appropriately for winter conditions, by wearing their nightgown out in a winter storm.

## Orientation

Orientation means the ability to accurately understand or recognize person or place or time to maintain health and safety. Assess how the individual would function without assistance of another person, a care setting or alternative service resource.

Answer must be based on the functions of the brain and how it affects the cognitive process.

**Select the most appropriate response:**

A. Independent

B. LESS THAN DAILY, needs assistance due to episodic disorientation during the week.

C. Needs DAILY assistance due to being disoriented.

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# Orientation

## Quick Help Header

### Tips for assessing Orientation:

- **Time Frame** means thirty days prior and thirty days following the assessment date and expect the need to be on-going beyond the assessment time frame.
- **The assessment time frame may be expanded** when assessing cognition/behavior. History or incidents that are more than 30 days prior to the assessment date may be considered if they negatively impacted health and safety in the past and are likely to re-occur without supports.
- For all 8 areas of cognition, consider the individual's cognitive "ability" to use information.
- Tie orientation back to how it impacts the health and safety of the individual. Forgetting what year it is does not necessarily impact the health and safety of the person.
- Does the person recognize family, friends and caregivers? Consider how this impacts health and safety?
- Example of "Person": Impacts health and safety if the individual allows a stranger into the home thinking that the stranger is a family member.
- Example of "Place": Impacts health and safety when an individual urinates in the corner of the room at night at the AFH, as the corner of his room is the same distance away as the bathroom was from his room at home.
- Example "Time": Consumer gets up at 2:00 AM and goes outside to attempt to catch the bus to go to work. The consumer no longer works and when she did, she worked day shift. This person does not understand the difference between day and night and going outside to catch the bus would impact her safety.

# Danger to Self or Others



Danger to Self or Others means behavioral symptoms, other than wandering, that are hazardous to the individual (including self-injury), or harmful or disruptive to those around the individual. Assess how the individual would function without assistance of another person, a care setting or alternative service resource.

Answer must be based on the functions of the brain and how it affects the cognitive process.

## **Select the most appropriate response:**

A. Independent

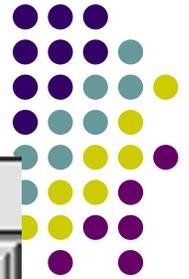
B. At least MONTHLY, needs to be verbally redirected due to challenging behavioral symptoms in one or more of the following:

- Disruptive; **or**
- Aggressive in a non-physical way; **or**
- Agitated; **or**
- Sexually inappropriate.

C. Has had MORE THAN ONE episode of behavioral symptoms that are extreme, may be unpredictable and necessitate intervention beyond verbal redirection, requiring an individualized behavioral care plan [REDACTED] that all staff are trained to deliver:

- Aggressive; **or**
- Disruptive; **or**
- Agitated; **or**
- Dangerous; **or**
- Physically abusive; **or**
- Sexually aggressive behavioral symptoms.

# Quick Help Header



## Danger to Self or Others

### Tips for assessing Danger to Self or Other:

- **Time Frame** means thirty days prior and thirty days following the assessment date and expect the need to be on-going beyond the assessment time frame.
- **The assessment time frame may be expanded** when assessing cognition/behavior. History or incidents that are more than 30 days prior to the assessment date may be considered if they negatively impacted health and safety in the past and are likely to re-occur without supports.
- For all 8 areas of cognition, consider the individual's cognitive "ability" to use information.
- An example of sexually inappropriateness could be a person going into another residents room for the purpose of sexual activity.



# Demands on Others

Demands on Others means behavioral symptoms, other than wandering, that negatively impact and affect living arrangements, providers or other residents. Assess how the individual would function without assistance of another person, a care setting or alternative service resource.

Answer must be based on the functions of the brain and how it affects the cognitive process.

## **Select the most appropriate response:**

A. Independent

B. Habits and emotional states limit the types of living arrangements and companions, but can be modified with individualized routines, changes to the environment or general training for the provider that is not specific to the individual.

C. The individual's behaviors pose a risk to the individual or to others which require the provider to constantly intervene, supervise or redirect.

D. Habits and emotional states can be modified only with a 24-hour specialized care setting or an individualized behavioral care plan that all staff are trained to deliver.

# Demands on Others

## Quick Help Header



### Tips for assessing Demands on Others:

- **Time Frame** means thirty days prior and thirty days following the assessment date and expect the need to be on-going beyond the assessment time frame.
- **The assessment time frame may be expanded** when assessing cognition/behavior. History or incidents that are more than 30 days prior to the assessment date may be considered if they negatively impacted health and safety in the past and are likely to re-occur without supports.
- For all 8 areas of cognition, consider the individual's cognitive "ability" to use information.
- An example could be an individual who gets irritated, aggravated and yells at his/her roommate because he doesn't want the TV on because he cannot handle loud noises. The provider resolved this by providing headphones for the roommate and the individual no longer was aggravated and irritable due to loud noises. Without the support of the provider, the individual would continue to cause problems with the other resident.

## Wandering

Wandering means moving about aimlessly, or elopement, without relationship to needs or safety. Assess how the individual would function without assistance of another person, a care setting or alternative service resource.

Answer must be based on the functions of the brain and how it affects the cognitive process.

**Select the most appropriate response:**

- A. Independent
- B. Wanders within the home or facility, but does not jeopardize safety.
- C. Wanders inside or out and jeopardizes safety.

# Wandering Quick Help Header



## Tips for assessing Wandering:

- **Time Frame** means thirty days prior and thirty days following the assessment date and expect the need to be on-going beyond the assessment time frame.
- **The assessment time frame may be expanded** when assessing cognition/behavior. History or incidents that are more than 30 days prior to the assessment date may be considered if they negatively impacted health and safety in the past and are likely to re-occur without supports.
- For all 8 areas of cognition, consider the individual's cognitive "ability" to use information.
- An example of wandering could be an individual with dementia that tries to leave the facility because he/she thinks he/she has to go to work or go home. Another example could be an individual that aimlessly walks around the facility without purpose or a plan to go somewhere.

## Bathing

The individual needs, assistance getting in and out of the bathtub or shower, bathing or washing hair.

**Select the most appropriate response** (Steps of bathing are described in the quick help header):

A. Independent

B. Unable to accomplish bathing **and** the individual needs:

- **HANDS-ON** assistance with any of the steps some of the time; **or**
- **HANDS-ON** assistance with up to two steps always, but doesn't need hands-on assistance for the remaining step(s); **or**
- **CUEING** or **STAND-BY** assistance during Step 1 **and/or** Step 2 **and/or** Step 3 some of the time or always.

C. **ALWAYS** needs **HANDS-ON** assistance during Step 1, Step 2 **and** Step 3.



# Bathing

## Quick Help Header

**Bathing** means the activities of bathing and washing hair, using *assistive devices* if needed. Bathing includes the act of getting in and out of the bathtub or shower.

### Tips for assessing Bathing

- Bathing is broken into three steps.
  - Step 1:** Inability to get in and out of the bath tub or shower.
  - Step 2:** Inability to fully complete the task of washing their body. If an individual cannot fully accomplish washing any part of their body, then the individual cannot complete the task of bathing. Do not break bathing the body into multiple parts of the body. Bathing the body is one step.
  - Step 3:** Inability to wash their hair.
- Any step the individual is unable to fully accomplish is considered the inability to complete the step. The individual would not be able to complete the step without assistance from another person.
- Independent means:
  - No assistance needed to fully complete all 3 steps.
- Assist means:
  - Unable to accomplish one or two of the steps **some or all** of the time, but is always able to complete at least one of the steps; **or**
  - Unable to accomplish all three steps **some** of the time.
- Full Assist means:
  - Unable to accomplish all three steps each time bathing occurs without hands-on assistance.
- **Time Frame** means thirty days prior and thirty days following the assessment date.



# Personal Hygiene

The individual needs, with or without assistive devices, assistance from another person to shave, care for the mouth or with the tasks of menstruation care.

## Select the most appropriate response:

A. Independent

B. Unable to accomplish at least one of the tasks of personal hygiene.

The individual needs:

- **HANDS-ON** assistance **always** for one task of personal hygiene, but doesn't always need hands-on assistance for the remaining two tasks **or**
  - **HANDS-ON** assistance needed **some** of the time for one or two of the tasks of personal hygiene, but doesn't need hands-on assistance for the remaining tasks; **or**
  - **CUEING or STAND-BY** assistance needed for at least one and up to all of the tasks of personal hygiene.
- C. **ALWAYS** needs **HANDS-ON** assistance for at least two of the tasks of personal hygiene.

# OAR 411-015-0006(4)(b) is being Amended



## Personal Hygiene rule:

- Previously, tasks of menstruation care was not technically allowed in rule.
- Now, includes tasks of menstruation care.
- Now allows for a person to be full assist if they always need assistance with at least 2 tasks of personal hygiene.

# Personal Hygiene Quick Help Header

**Personal Hygiene** means the activities of shaving, caring for the mouth or assistance with tasks of menstruation care.

## Tips for assessing Personal Hygiene

- Shaving consists of various areas of the body, such as the face, legs or underarms.
- Caring for the mouth consists of brushing teeth, dental floss, denture care, mouthwash and/or other tasks the individual requires for mouth care.
- Independent means:
  - No assistance needed to fully complete shaving, caring for the mouth or tasks of menstruation care.
- Assist means:
  - Always needs hands-on assistance with one of the tasks of personal hygiene, but doesn't need any assistance or may need **some** assistance with the other two tasks; or
  - Needs **hands-on** assistance **some** of the time with one of the tasks, but doesn't need any assistance with the remaining tasks; or
  - Needs **hands-on** assistance **some** of the time with two or more of the tasks, but doesn't need assistance with the remaining task.
- Full Assist means:
  - Always needs hands-on assistance with two or more of the tasks.
- **Time Frame** means thirty days prior and thirty days following the assessment date.





## Dressing

The individual needs, with or without assistive devices, assistance from another person to dress and undress.

**Select the most appropriate response**. (Steps of dressing are described in the quick help header):

A. Independent

B. Unable to accomplish dressing. This means:

- **HANDS-ON** assistance for step 1 or 2 some of the time; or
- **HANDS-ON** assistance for one of the steps always, but doesn't need hands-on assistance for the remaining step;  or
- **CUEING** or **STAND-BY** assistance during steps 1 and/or step 2 some of the time or always.

C. **ALWAYS** needs **HANDS-ON** assistance for step one and two.

# Dressing Quick Help Header



Dressing means the activities of dressing and undressing.

## **Tips for assessing Dressing:**

- Dressing is broken into two steps:
  - Step 1: Inability to fully complete the task of dressing or undressing the top half of body.
  - Step 2: Inability to fully complete the task of dressing or undressing the bottom half of the body.
- Any part of a step the individual is unable to fully accomplish is considered the inability to complete the full step (e.g. putting one arm.....)
- Compression socks, commonly known as 'ted hose', is captured as a dressing function.
- Independent means:
  - No assistance needed to complete Step 1 or Step 2.
- Assist means:
  - Always needs assistance for Step 1 **or** Step 2; or
  - Does not always need assistance with Step 1 and Step 2, but sometimes needs assistance with both steps.
- Full Assist means:
  - Always needs hands-on assistance for Step 1 **and** Step 2.
- **Time Frame** means thirty days prior and thirty days following the assessment date.



## Grooming

The individual needs, with or without assistive devices, assistance from another person for nail and hair care.

**Select the most appropriate response:**

A. Independent

B. Unable to accomplish nail and/or hair care. The individual needs:

- **HANDS-ON** assistance for nail or hair care **some** of the time; **or**
- **CUEING** or **STAND-BY** assistance during the activity of nail **and/or** hair care **some** of the time **or** always; **or**

C. **ALWAYS** needs **HANDS-ON** assistance for nail care **and** hair care.

# Grooming Quick Help Header



Grooming means nail and hair care.

## **Tips for assessing Grooming:**

- Nail care consists of cutting and cleaning toe nails and/or finger nails.
- Hair care includes tasks to brush and comb hair and may include activities such as using rubber bands, barrettes, braiding hair, pony tails, etc....
- Independent means:
  - No assistance needed to fully complete nail and hair care.
- Assist means:
  - Needs hands-on, cueing, or stand-by assistance with hair and/or nail care some of the time, but not always; or
  - Needs hands-on assistance always with hair care, but not nail care.
  - Needs hands-on assistance always with nail care, but not hair care.
- Full Assist means:
  - Always needs hands-on assistance with nail and hair care.
- **Time Frame** means thirty days prior and thirty days following the assessment date.

## Breakfast

The individual needs assistance from another person to safely prepare food meeting basic nutritional requirements.

**Select the most appropriate response:**

A. Independent

B. Is **able to accomplish a majority** of the meal preparation tasks, but not all the tasks.

C. Is **able to accomplish only a small portion** of the meal preparation tasks without assistance.

D. **ALWAYS** needs assistance for all tasks of meal preparation.

D

# Meal Prep Quick Help Header



**Meal Preparation** means the ability to safely prepare food to meet basic nutritional requirements of the individual. It includes placing food, dishes and utensils within reach for eating.

## **Tips for assessing Meal Prep**

- When assessing and developing service plans, dinner/supper is considered the individual's main meal of the day, regardless of the time the meal is served or eaten.
- Do not require or consider whether the person is using a microwave, toaster, store bought or home delivered meals when assessing the individual. If the person chooses any of these methods of preparation, you may reduce the hours in the service plan based on how much time is actually needed to prepare the meal of their choice.
- Even with home delivered meals (HDM), the individual may still meet the assistance or full assistance criteria. If HDM is received, the in-home hours may need to be reduced.
- Cutting food up or bringing food to the table is considered in Meal Preparation, not Eating.
- **Time Frame** means thirty days prior and thirty days following the assessment date

# OAR 411-015-0008(1)(g)



## Assessments

- “Annual” has changed to “All” reassessments must be conducted in the individual’s home or care setting unless there is a compelling reason to meet elsewhere and the individual requests an alternative location. Case managers must visit an individual’s home or care setting to complete the re-assessment and identify service plan needs, as well as safety and risk concerns.
- Note: this applies to initial assessment as well.



# OAR 411-015-0100 Amended

## Eligibility for nursing facility or HCBS:

- Changed Medicaid medical eligibility from OSIPM to Medicaid OHP Plus benefit package.
  - This expanded the Medicaid criteria for MAGI eligible individuals needing Medicaid LTC services if otherwise eligible.
- **Effective 10-01-14**, individuals receiving LTC services based on MAGI eligibility, rather than OSIPM eligibility will be subject to the Transfer of Assets criteria from OAR 461-140-0210 to 461-140-0300 in the same manner as OSIPM individuals

# Contacts & Resources



- **DHS Service Desk**
  - (503) 945-5623
- **APD Case Management Tools website at:**
  - <http://www.dhs.state.or.us/spd/tools/cm/index.htm>
- **Suzy Quinlan, Operations & Policy Analyst**
  - APD Medicaid LTC Systems Unit
  - (503) 947-5189