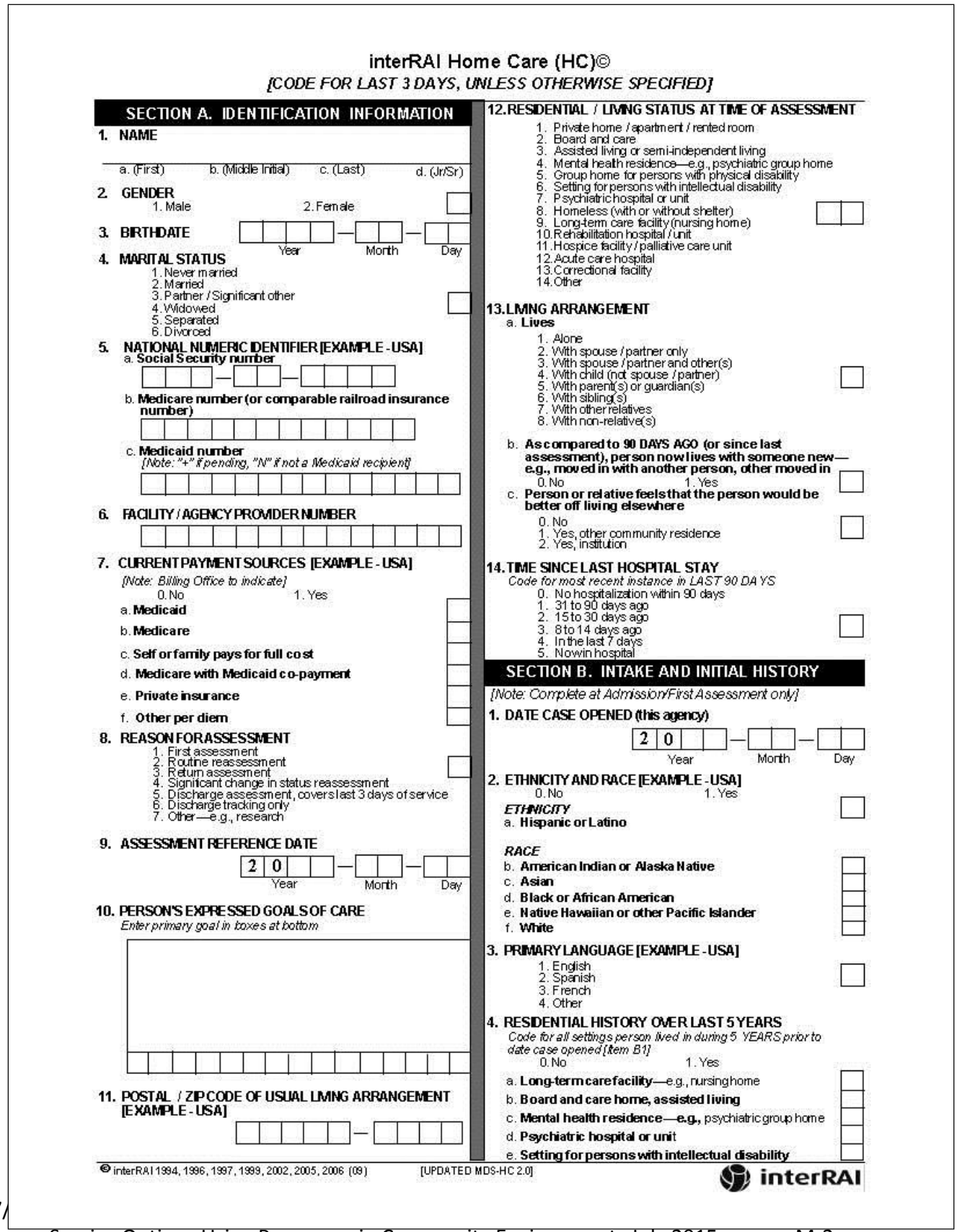
Rev. 04/11 Note: Remember when assessing LOC with the Multi Data Set – Home Care (MDS-HC) that the target population for SOURCE are physically disabled individuals who are functionally impaired, or who have acquired a cognitive loss, that results in the need for assistance in the performance of the activities of daily living (ADLs) or instrumental activities of daily living (IADLs); these individuals must meet the Definition for Intermediate Nursing Home LEVEL OF CARE.)

Look for physically disabled individuals who are functionally impaired, or who have acquired a cognitive loss, that results in the need for assistance



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[CODE FOR LAST 3 DAYS, UNLESS OTHERWISE SPECIFIED]

SECTION A. IDENTIFICATION INFORMATION

1. NAME

a. (First) b. (Middle Initial) c. (Last) d. (Jr/Sr)

2. GENDER
1. Male 2. Female

3. BIRTHDATE
Year Month Day

4. MARITAL STATUS
1. Never married
2. Married
3. Partner / Significant other
4. Widowed
5. Separated
6. Divorced

5. NATIONAL NUMERIC IDENTIFIER [EXAMPLE - USA]
a. **Social Security number**

b. **Medicare number (or comparable railroad insurance number)**

c. **Medicaid number**
[Note: "+" if pending, "N" if not a Medicaid recipient]

6. FACILITY / AGENCY PROVIDER NUMBER

7. CURRENT PAYMENT SOURCES [EXAMPLE - USA]
[Note: Billing Office to indicate]
0. No 1. Yes
a. **Medicaid**
b. **Medicare**
c. **Self or family pays for full cost**
d. **Medicare with Medicaid co-payment**
e. **Private insurance**
f. **Other per diem**

8. REASON FOR ASSESSMENT
1. First assessment
2. Routine reassessment
3. Return assessment
4. Significant change in status reassessment
5. Discharge assessment, covers last 3 days of service
6. Discharge tracking only
7. Other—e.g., research

9. ASSESSMENT REFERENCE DATE
2 0 — — —
Year Month Day

10. PERSON'S EXPRESSED GOALS OF CARE
Enter primary goal in boxes at bottom

11. POSTAL / ZIP CODE OF USUAL LIVING ARRANGEMENT [EXAMPLE - USA]

12. RESIDENTIAL / LIVING STATUS AT TIME OF ASSESSMENT
1. Private home / apartment / rented room
2. Board and care
3. Assisted living or semi-independent living
4. Mental health residence—e.g., psychiatric group home
5. Group home for persons with physical disability
6. Setting for persons with intellectual disability
7. Psychiatric hospital or unit
8. Homeless (with or without shelter)
9. Long-term care facility (nursing home)
10. Rehabilitation hospital / unit
11. Hospice facility / palliative care unit
12. Acute care hospital
13. Correctional facility
14. Other

13. LIVING ARRANGEMENT
a. **Lives**
1. Alone
2. With spouse / partner only
3. With spouse / partner and other(s)
4. With child (not spouse / partner)
5. With parent(s) or guardian(s)
6. With sibling(s)
7. With other relatives
8. With non-relative(s)

b. **As compared to 90 DAYS AGO (or since last assessment), person now lives with someone new—e.g., moved in with another person, other moved in**
0. No 1. Yes

c. **Person or relative feels that the person would be better off living elsewhere**
0. No
1. Yes, other community residence
2. Yes, institution

14. TIME SINCE LAST HOSPITAL STAY
Code for most recent instance in LAST 90 DAYS
0. No hospitalization within 90 days
1. 31 to 90 days ago
2. 15 to 30 days ago
3. 8 to 14 days ago
4. In the last 7 days
5. Now in hospital

SECTION B. INTAKE AND INITIAL HISTORY

[Note: Complete at Admission/First Assessment only]

1. DATE CASE OPENED (this agency)
2 0 — — —
Year Month Day

2. ETHNICITY AND RACE [EXAMPLE - USA]
0. No 1. Yes

ETHNICITY
a. **Hispanic or Latino**

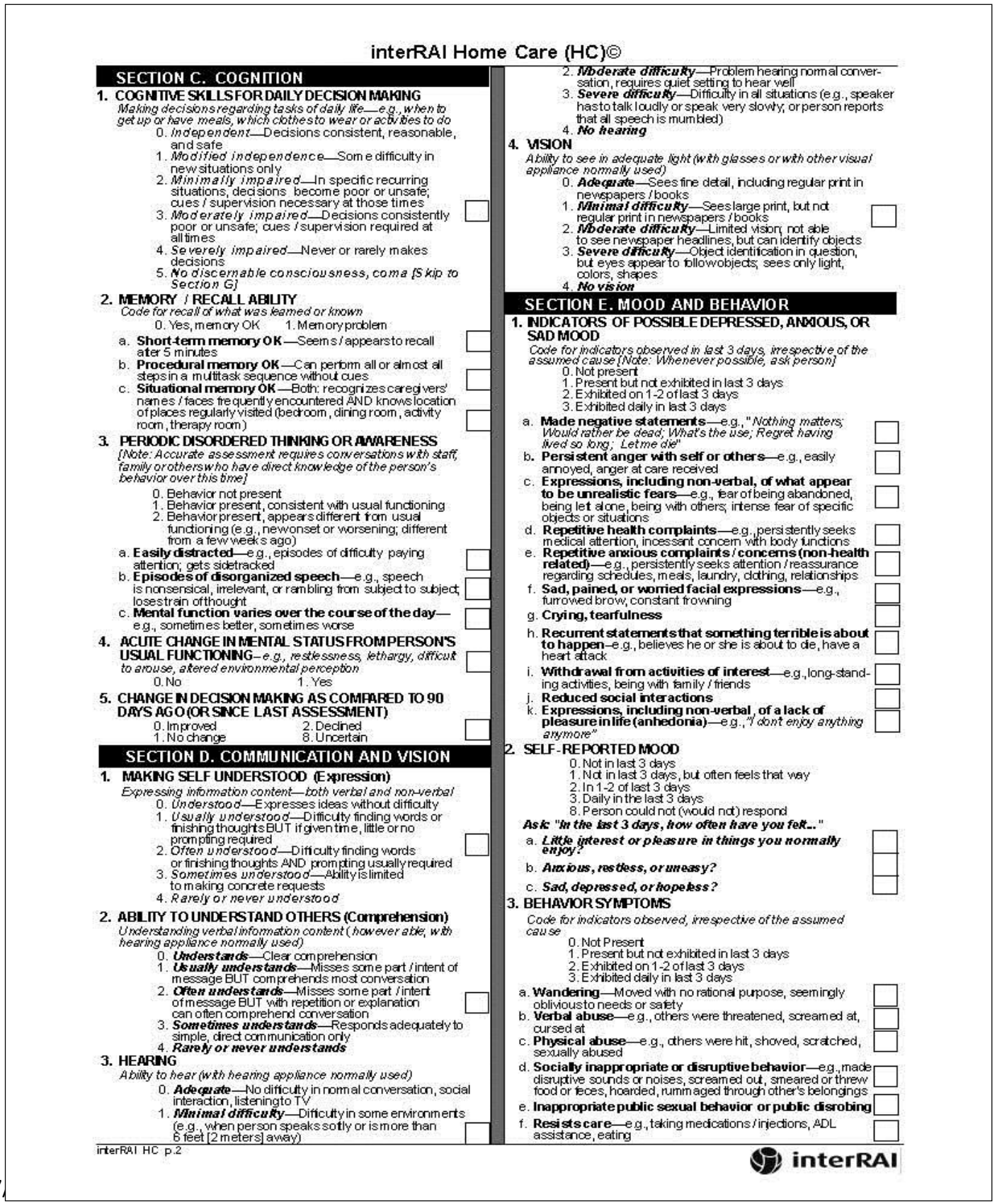
RACE
b. **American Indian or Alaska Native**
c. **Asian**
d. **Black or African American**
e. **Native Hawaiian or other Pacific Islander**
f. **White**

3. PRIMARY LANGUAGE [EXAMPLE - USA]
1. English
2. Spanish
3. French
4. Other

4. RESIDENTIAL HISTORY OVER LAST 5 YEARS
Code for all settings person lived in during 5 YEARS prior to date case opened [Item B1]
0. No 1. Yes
a. **Long-term care facility**—e.g., nursing home
b. **Board and care home, assisted living**
c. **Mental health residence—e.g.,** psychiatric group home
d. **Psychiatric hospital or unit**
e. **Setting for persons with intellectual disability**

 [UPDATED MDS-HC 2.0] interRAI

Look for physically disabled individuals who are functionally impaired, or who have acquired a cognitive loss, that results in the need for assistance



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SECTION C. COGNITION

1. COGNITIVE SKILLS FOR DAILY DECISION MAKING
Making decisions regarding tasks of daily life—e.g., when to get up or have meals, which clothes to wear or activities to do
0. *Independent*—Decisions consistent, reasonable, and safe
1. *Modified independence*—Some difficulty in new situations only
2. *Minimally impaired*—In specific recurring situations, decisions become poor or unsafe; cues / supervision necessary at those times
3. *Moderately impaired*—Decisions consistently poor or unsafe; cues / supervision required at all times
4. *Severely impaired*—Never or rarely makes decisions
5. *No discernable consciousness, coma [Skip to Section G]*

2. MEMORY / RECALL ABILITY
Code for recall of what was learned or known
0. Yes, memory OK 1. Memory problem
a. **Short-term memory OK**—Seems / appears to recall after 5 minutes
b. **Procedural memory OK**—Can perform all or almost all steps in a multitask sequence without cues
c. **Situational memory OK**—Both: recognizes caregivers' names / faces frequently encountered AND knows location of places regularly visited (bedroom, dining room, activity room, therapy room)

3. PERIODIC DISORDERED THINKING OR AWARENESS
[Note: Accurate assessment requires conversations with staff, family or others who have direct knowledge of the person's behavior over this time]
0. Behavior not present
1. Behavior present, consistent with usual functioning
2. Behavior present, appears different from usual functioning (e.g., new onset or worsening; different from a few weeks ago)
a. **Easily distracted**—e.g., episodes of difficulty paying attention; gets sidetracked
b. **Episodes of disorganized speech**—e.g., speech is nonsensical, irrelevant, or rambling from subject to subject; loses train of thought
c. **Mental function varies over the course of the day**—e.g., sometimes better, sometimes worse

4. ACUTE CHANGE IN MENTAL STATUS FROM PERSON'S USUAL FUNCTIONING—*e.g., restlessness, lethargy, difficult to arouse, altered environmental perception*
0. No 1. Yes

5. CHANGE IN DECISION MAKING AS COMPARED TO 90 DAYS AGO (OR SINCE LAST ASSESSMENT)
0. Improved 2. Declined
1. No change 8. Uncertain

SECTION D. COMMUNICATION AND VISION

1. MAKING SELF UNDERSTOOD (Expression)
Expressing information content—both verbal and non-verbal
0. *Understood*—Expresses ideas without difficulty
1. *Usually understood*—Difficulty finding words or finishing thoughts BUT if given time, little or no prompting required
2. *Often understood*—Difficulty finding words or finishing thoughts AND prompting usually required
3. *Sometimes understood*—Ability is limited to making concrete requests
4. *Rarely or never understood*

2. ABILITY TO UNDERSTAND OTHERS (Comprehension)
Understanding verbal information content (however able; with hearing appliance normally used)
0. ***Understands***—Clear comprehension
1. ***Usually understands***—Misses some part / intent of message BUT comprehends most conversation
2. ***Often understands***—Misses some part / intent of message BUT with repetition or explanation can often comprehend conversation
3. ***Sometimes understands***—Responds adequately to simple, direct communication only
4. ***Rarely or never understands***

3. HEARING
Ability to hear (with hearing appliance normally used)
0. ***Adequate***—No difficulty in normal conversation, social interaction, listening to TV
1. ***Minimal difficulty***—Difficulty in some environments (e.g., when person speaks softly or is more than 6 feet [2 meters] away)
2. ***Moderate difficulty***—Problem hearing normal conversation, requires quiet setting to hear well
3. ***Severe difficulty***—Difficulty in all situations (e.g., speaker has to talk loudly or speak very slowly, or person reports that all speech is mumbled)
4. ***No hearing***

4. VISION
Ability to see in adequate light (with glasses or with other visual appliance normally used)
0. ***Adequate***—Sees fine detail, including regular print in newspapers / books
1. ***Minimal difficulty***—Sees large print, but not regular print in newspapers / books
2. ***Moderate difficulty***—Limited vision; not able to see newspaper headlines, but can identify objects
3. ***Severe difficulty***—Object identification in question, but eyes appear to follow objects; sees only light, colors, shapes
4. ***No vision***

SECTION E. MOOD AND BEHAVIOR

1. INDICATORS OF POSSIBLE DEPRESSED, ANXIOUS, OR SAD MOOD
Code for indicators observed in last 3 days, irrespective of the assumed cause [Note: Whenever possible, ask person]
0. Not present
1. Present but not exhibited in last 3 days
2. Exhibited on 1-2 of last 3 days
3. Exhibited daily in last 3 days
a. **Made negative statements**—e.g., "*Nothing matters; Would rather be dead; What's the use; Regret having lived so long; Let me die*"
b. **Persistent anger with self or others**—e.g., easily annoyed, anger at care received
c. **Expressions, including non-verbal, of what appear to be unrealistic fears**—e.g., fear of being abandoned, being let alone, being with others; intense fear of specific objects or situations
d. **Repetitive health complaints**—e.g., persistently seeks medical attention, incessant concern with body functions
e. **Repetitive anxious complaints / concerns (non-health related)**—e.g., persistently seeks attention / reassurance regarding schedules, meals, laundry, clothing, relationships
f. **Sad, pained, or worried facial expressions**—e.g., furrowed brow, constant frowning
g. **Crying, tearfulness**
h. **Recurrent statements that something terrible is about to happen**—e.g., believes he or she is about to die, have a heart attack
i. **Withdrawal from activities of interest**—e.g., long-standing activities, being with family / friends
j. **Reduced social interactions**
k. **Expressions, including non-verbal, of a lack of pleasure in life (anhedonia)**—e.g., "*I don't enjoy anything anymore*"

2. SELF-REPORTED MOOD
0. Not in last 3 days
1. Not in last 3 days, but often feels that way
2. In 1-2 of last 3 days
3. Daily in the last 3 days
8. Person could not (would not) respond
Ask: "In the last 3 days, how often have you felt..."
a. ***Little interest or pleasure in things you normally enjoy?***
b. ***Anxious, restless, or uneasy?***
c. ***Sad, depressed, or hopeless?***

3. BEHAVIOR SYMPTOMS
Code for indicators observed, irrespective of the assumed cause
0. Not Present
1. Present but not exhibited in last 3 days
2. Exhibited on 1-2 of last 3 days
3. Exhibited daily in last 3 days
a. **Wandering**—Moved with no rational purpose, seemingly oblivious to needs or safety
b. **Verbal abuse**—e.g., others were threatened, screamed at, cursed at
c. **Physical abuse**—e.g., others were hit, shoved, scratched, sexually abused
d. **Socially inappropriate or disruptive behavior**—e.g., made disruptive sounds or noises, screamed out, smeared or threw food or feces, hoarded, rummaged through other's belongings
e. **Inappropriate public sexual behavior or public disrobing**
f. **Resists care**—e.g., taking medications / injections, ADL assistance, eating

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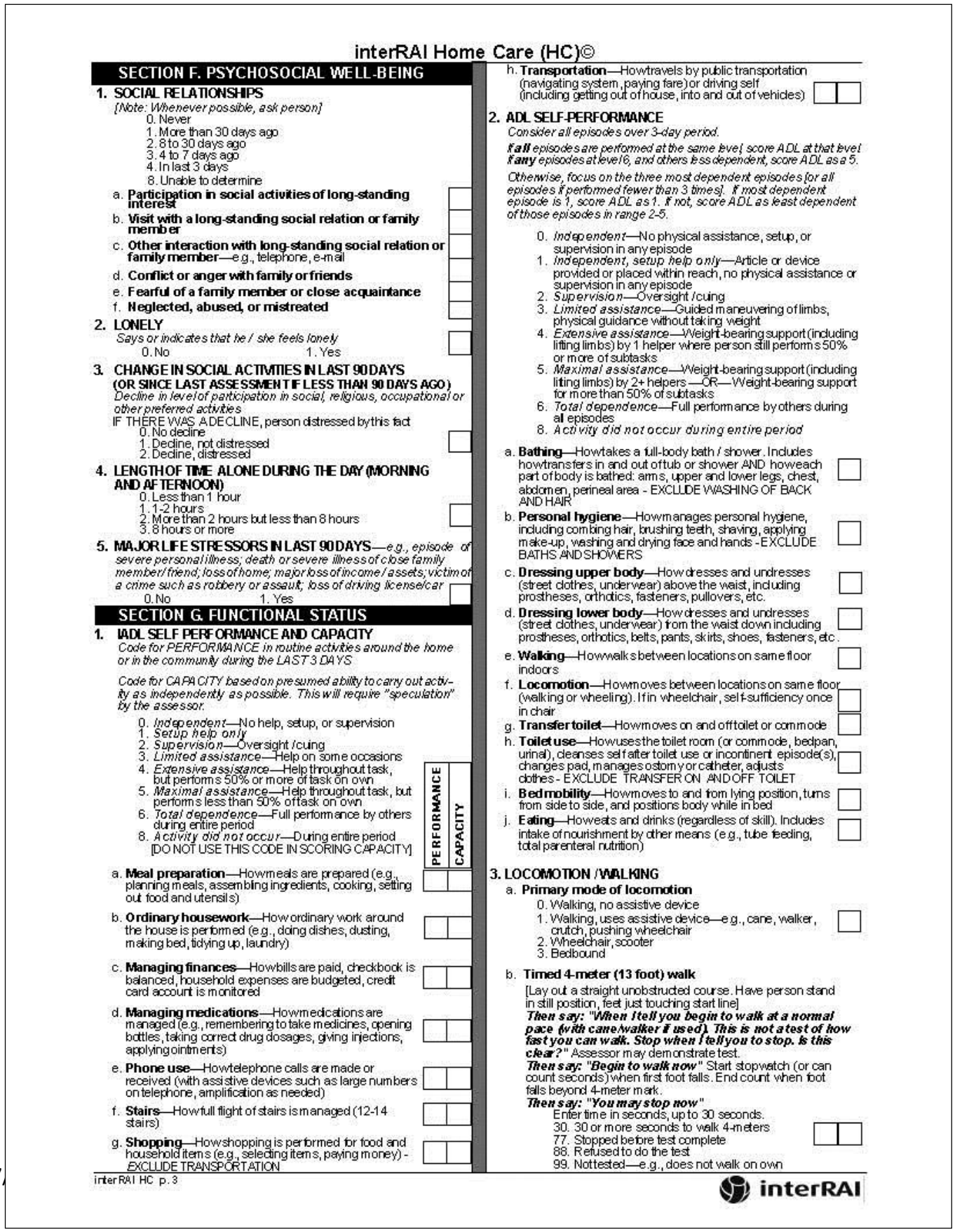
Look for physically disabled individuals who are functionally impaired, or who have acquired a cognitive loss, that results in the need for assistance



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SECTION F. PSYCHOSOCIAL WELL-BEING

1. SOCIAL RELATIONSHIPS

[Note: Whenever possible, ask person]

0. Never
1. More than 30 days ago
2. 8 to 30 days ago
3. 4 to 7 days ago
4. In last 3 days
8. Unable to determine

a. **Participation in social activities of long-standing interest**
b. **Visit with a long-standing social relation or family member**
c. **Other interaction with long-standing social relation or family member**—e.g., telephone, e-mail
d. **Conflict or anger with family or friends**
e. **Fearful of a family member or close acquaintance**
f. **Neglected, abused, or mistreated**

2. LONELY

Says or indicates that he / she feels lonely

0. No 1. Yes

3. CHANGE IN SOCIAL ACTIVITIES IN LAST 90 DAYS (OR SINCE LAST ASSESSMENT IF LESS THAN 90 DAYS AGO)

Decline in level of participation in social, religious, occupational or other preferred activities

IF THERE WAS A DECLINE, person distressed by this fact

0. No decline
1. Decline, not distressed
2. Decline, distressed

4. LENGTH OF TIME ALONE DURING THE DAY (MORNING AND AFTERNOON)

0. Less than 1 hour
1. 1-2 hours
2. More than 2 hours but less than 8 hours
3. 8 hours or more

5. MAJOR LIFE STRESSORS IN LAST 90 DAYS—*e.g., episode of severe personal illness; death or severe illness of close family member/friend; loss of home; major loss of income / assets; victim of a crime such as robbery or assault; loss of driving license/car*

0. No 1. Yes

SECTION G. FUNCTIONAL STATUS

1. IADL SELF PERFORMANCE AND CAPACITY

Code for PERFORMANCE in routine activities around the home or in the community during the LAST 3 DAYS

Code for CAPACITY based on presumed ability to carry out activity as independently as possible. This will require "speculation" by the assessor.

0. *Independent*—No help, setup, or supervision
1. *Setup help only*
2. *Supervision*—Oversight / cuing
3. *Limited assistance*—Help on some occasions
4. *Extensive assistance*—Help throughout task, but performs 50% or more of task on own
5. *Maximal assistance*—Help throughout task, but performs less than 50% of task on own
6. *Total dependence*—Full performance by others during entire period
8. *Activity did not occur*—During entire period [DO NOT USE THIS CODE IN SCORING CAPACITY]

	PERFORMANCE	CAPACITY
a. **Meal preparation**—How meals are prepared (e.g., planning meals, assembling ingredients, cooking, setting out food and utensils)		
b. **Ordinary housework**—How ordinary work around the house is performed (e.g., doing dishes, dusting, making bed, tidying up, laundry)		
c. **Managing finances**—How bills are paid, checkbook is balanced, household expenses are budgeted, credit card account is monitored		
d. **Managing medications**—How medications are managed (e.g., remembering to take medicines, opening bottles, taking correct drug dosages, giving injections, applying ointments)		
e. **Phone use**—How telephone calls are made or received (with assistive devices such as large numbers on telephone, amplification as needed)		
f. **Stairs**—How full flight of stairs is managed (12-14 stairs)		
g. **Shopping**—How shopping is performed for food and household items (e.g., selecting items, paying money) - EXCLUDE TRANSPORTATION		
h. **Transportation**—How travels by public transportation (navigating system, paying fare) or driving self (including getting out of house, into and out of vehicles)		

2. ADL SELF-PERFORMANCE

Consider all episodes over 3-day period.

***If all** episodes are performed at the same level, score ADL at that level **If any** episodes at level 6, and others less dependent, score ADL as a 5.*

Otherwise, focus on the three most dependent episodes [or all episodes if performed fewer than 3 times]. If most dependent episode is 1, score ADL as 1. If not, score ADL as least dependent of those episodes in range 2-5.

0. *Independent*—No physical assistance, setup, or supervision in any episode
1. *Independent, setup help only*—Article or device provided or placed within reach, no physical assistance or supervision in any episode
2. *Supervision*—Oversight / cuing
3. *Limited assistance*—Guided maneuvering of limbs, physical guidance without taking weight
4. *Extensive assistance*—Weight-bearing support (including lifting limbs) by 1 helper where person still performs 50% or more of subtasks
5. *Maximal assistance*—Weight-bearing support (including lifting limbs) by 2+ helpers —OR— Weight-bearing support for more than 50% of subtasks
6. *Total dependence*—Full performance by others during all episodes
8. *Activity did not occur during entire period*

a. **Bathing**—How takes a full-body bath / shower. Includes how transfers in and out of tub or shower AND how each part of body is bathed: arms, upper and lower legs, chest, abdomen, perineal area - EXCLUDE WASHING OF BACK AND HAIR
b. **Personal hygiene**—How manages personal hygiene, including combing hair, brushing teeth, shaving, applying make-up, washing and drying face and hands - EXCLUDE BATHS AND SHOWERS
c. **Dressing upper body**—How dresses and undresses (street clothes, underwear) above the waist, including prostheses, orthotics, fasteners, pullovers, etc.
d. **Dressing lower body**—How dresses and undresses (street clothes, underwear) from the waist down including prostheses, orthotics, belts, pants, skirts, shoes, fasteners, etc.
e. **Walking**—How walks between locations on same floor indoors
f. **Locomotion**—How moves between locations on same floor (walking or wheeling). If in wheelchair, self-sufficiency once in chair
g. **Transfer toilet**—How moves on and off toilet or commode
h. **Toilet use**—How uses the toilet room (or commode, bedpan, urinal), cleanses self after toilet use or incontinent episode(s), changes pad, manages ostomy or catheter, adjusts clothes - EXCLUDE TRANSFER ON AND OFF TOILET
i. **Bed mobility**—How moves to and from lying position, turns from side to side, and positions body while in bed
j. **Eating**—How eats and drinks (regardless of skill). Includes intake of nourishment by other means (e.g., tube feeding, total parenteral nutrition)

3. LOCOMOTION / WALKING

a. **Primary mode of locomotion**

0. Walking, no assistive device
1. Walking, uses assistive device—e.g., cane, walker, crutch, pushing wheelchair
2. Wheelchair, scooter
3. Bedbound

b. **Timed 4-meter (13 foot) walk**

[Lay out a straight unobstructed course. Have person stand in still position, feet just touching start line]

Then say: "When I tell you begin to walk at a normal pace (with cane/walker if used). This is not a test of how fast you can walk. Stop when I tell you to stop. Is this clear?" Assessor may demonstrate test.

Then say: "Begin to walk now" Start stopwatch (or can count seconds) when first foot falls. End count when foot falls beyond 4-meter mark.

Then say: "You may stop now"

Enter time in seconds, up to 30 seconds.
30. 30 or more seconds to walk 4-meters
77. Stopped before test complete
88. Refused to do the test
99. Not tested—e.g., does not walk on own

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c. **Distance walked**–Farthest distance walked at one time without sitting down in the LAST 3 DAYS (with support as needed)
0. Did not walk
1. Less than 15 feet (under 5 meters)
2. 15-149 feet (5-49 meters)
3. 150-299 feet (50-99 meters)
4. 300+ feet (100+ meters)
5. 1/2 mile or more (1+ kilometers)

d. **Distance wheeled self**–Farthest distance wheeled self at one time in the LAST 3 DAYS (includes independent use of motorized wheelchair)
0. Wheeled by others
1. Used motorized wheelchair / scooter
2. Wheeled self less than 15 feet (under 5 meters)
3. Wheeled self 15-149 feet (5-49 meters)
4. Wheeled self 150-299 feet (50-99 meters)
5. Wheeled self 300+ feet (100+ meters)
8. Did not use wheelchair

4. ACTIVITY LEVEL

a. **Total hours of exercise or physical activity in LAST 3 DAYS**—e.g., walking
0. None
1. Less than 1 hour
2. 1-2 hours
3. 3-4 hours
4. More than 4 hours

b. In the LAST 3 DAYS, number of days went out of the house or building in which he/she resides (no matter how short the period)
0. No days out
1. Did not go out in last 3 days, but usually goes out over a 3-day period
2. 1-2 days
3. 3 days

5. PHYSICAL FUNCTION IMPROVEMENT POTENTIAL
0. No 1. Yes

a. **Person believes he / she is capable of improved performance in physical function**

b. **Care professional believes person is capable of improved performance in physical function**

6. CHANGE IN ADL STATUS AS COMPARED TO 90 DAYS AGO, OR SINCE LAST ASSESSMENT IF LESS THAN 90 DAYS AGO
0. Improved
1. No change
2. Declined
3. Uncertain

7. DRIVING

a. **Drove car (vehicle) in the LAST 90 DAYS**
0. No 1. Yes

b. **If drove in LAST 90 DAYS, assessor is aware that someone has suggested that person limits OR stops driving**
0. No, or does not drive 1. Yes

SECTION H. CONTINENCE

1. BLADDER CONTINENCE
0. *Continent*—Complete control; DOES NOT USE any type of catheter or other urinary collection device
1. *Control with any catheter or ostomy over last 3 days*
2. *Infrequently incontinent*—Not incontinent over last 3 days, but does have incontinent episodes
3. *Occasionally incontinent*—Less than daily
4. *Frequently incontinent*—Daily, but some control present
5. *Incontinent*—No control present
8. *Did not occur*—No urine output from bladder in last 3 days

2. URINARY COLLECTION DEVICE (Exclude pads / briefs)
0. None
1. Condom catheter
2. Indwelling catheter
3. Cystostomy, nephrostomy, ureterostomy

3. BOWEL CONTINENCE
0. ***Continent***—Complete control; DOES NOT USE any type of ostomy device
1. ***Control with ostomy***—Control with ostomy device over last 3 days
2. ***Infrequently incontinent***—Not incontinent over last 3 days, but does have incontinent episodes
3. ***Occasionally incontinent***—Less than daily
4. ***Frequently incontinent***—Daily, but some control present
5. ***Incontinent***—No control present
8. ***Did not occur***—No bowel movement in the last 3 days

4. PADS OR BRIEFS WORN
0. No 1. Yes

SECTION I. DISEASE DIAGNOSES

Disease code
0. Not present
1. Primary diagnosis/diagnoses for current stay
2. Diagnosis present, receiving active treatment
3. Diagnosis present, monitored but no active treatment

1. DISEASE DIAGNOSES

MUSCULOSKELETAL
a. **Hip fracture during last 30 days (or since last assessment if less than 30 days)**
b. **Other fracture during last 30 days (or since last assessment if less than 30 days)**

NEUROLOGICAL
c. **Alzheimers disease**
d. **Dementia other than Alzheimers disease**
e. **Hemiplegia**
f. **Multiple sclerosis**
g. **Paraplegia**
h. **Parkinson's disease**
i. **Quadriplegia**
j. **Stroke / CVA**

CARDIAC OR PULMONARY
k. **Coronary heart disease**
l. **Chronic obstructive pulmonary disease**
m. **Congestive heart failure**

PSYCHIATRIC
n. **Anxiety**
o. **Bipolar disorder**
p. **Depression**
q. **Schizophrenia**

INFECTIONS
r. **Pneumonia**
s. **Urinary tract infection in last 30 days**

OTHER
t. **Cancer**
u. **Diabetes mellitus**

2. OTHER DISEASE DIAGNOSES

	Diagnosis	Disease Code	ICD code
a.			
b.			
c.			
d.			
e.			
f.			

[Note: Add additional lines as necessary for other disease diagnoses]

SECTION J. HEALTH CONDITIONS

1. FALLS
0. No fall in last 90 days
1. No fall in last 30 days, but fell 31-90 days ago
2. One fall in last 30 days
3. Two or more falls in last 30 days

2. RECENT FALLS
[Skip if last assessed more than 30 days ago or if this is first assessment]
0. No
1. Yes
[blank] Not applicable (first assessment, or more than 30 days since last assessment)

3. PROBLEM FREQUENCY
Code for presence in last 3 days
0. Not present
1. Present but not exhibited in last 3 days
2. Exhibited on 1 of last 3 days
3. Exhibited on 2 of last 3 days
4. Exhibited daily in last 3 days

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BALANCE

a. **Difficult or unable to move self to standing position unassisted**

b. **Difficult or unable to turn self around and face the opposite direction when standing**

c. **Dizziness**

d. **Unsteady gait**

CARDIAC OR PULMONARY

e. **Chest pain**

f. **Difficulty clearing airway secretions**

PSYCHIATRIC

g. **Abnormal thought process**—e.g., loosening of associations, blocking, flight of ideas, tangentiality, circumstantiality

h. **Delusions**—Fixed false beliefs

i. **Hallucinations**—False sensory perceptions

NEUROLOGICAL

j. **Aphasia**

GI STATUS

k. **Acid reflux**—Regurgitation of acid from stomach to throat

l. **Constipation**—No bowel movement in 3 days or difficult passage of hard stool

m. **Diarrhea**

n. **Vomiting**

SLEEP PROBLEMS

o. **Difficulty falling asleep or staying asleep; waking up too early; restlessness; non-restful sleep**

p. **Too much sleep**—Excessive amount of sleep that interferes with person's normal functioning

OTHER

q. **Aspiration**

r. **Fever**

s. **GI or GU bleeding**

t. **Hygiene**—Unusually poor hygiene, unkempt, disheveled

u. **Peripheral edema**

4. DYSPNEA (Shortness of breath)

0. Absence of symptom
1. Absent at rest, but present when performed moderate activities
2. Absent at rest, but present when performed normal day-to-day activities
3. Present at rest

5. FATIGUE

Inability to complete normal daily activities—e.g., ADLs, IADLs

0. ***None***
1. ***Minimal***—Diminished energy but completes normal day-to-day activities
2. ***Moderate***—Due to diminished energy, UNABLE TO FINISH normal day-to-day activities
3. ***Severe***—Due to diminished energy, UNABLE TO START SOME normal day-to-day activities
4. ***Unable to commence any normal day-to-day activities***—Due to diminished energy

6. PAIN SYMPTOMS

[Note: Always ask the person about pain frequency, intensity, and control. Observe person and ask others who are in contact with the person.]

a. **Frequency with which person complains or shows evidence of pain (including grimacing, teeth clenching, moaning, withdrawal when touched, or other non-verbal signs suggesting pain)**

0. No pain
1. Present but not exhibited in last 3 days
2. Exhibited on 1-2 of last 3 days
3. Exhibited daily in last 3 days

b. **Intensity of highest level of pain present**

0. No pain
1. Mild
2. Moderate
3. Severe
4. Times when pain is horrible or excruciating

c. **Consistency of pain**

0. No pain
1. Single episode during last 3 days
2. Intermittent
3. Constant

d. **Breakthrough pain**—Times in LAST 3 DAYS when person experienced sudden, acute flare-ups of pain

0. No 1. Yes

e. **Pain control**—Adequacy of current therapeutic regimen to control pain (from person's point of view)

0. No issue of pain
1. Pain intensity acceptable to person; no treatment regimen or change in regimen required
2. Controlled adequately by therapeutic regimen
3. Controlled when therapeutic regimen followed, but not always followed as ordered
4. Therapeutic regimen followed, but pain control not adequate
5. No therapeutic regimen being followed for pain; pain not adequately controlled

7. INSTABILITY OF CONDITIONS

0. No 1. Yes

a. **Conditions / diseases make cognitive, ADL, mood or behavior patterns unstable** (fluctuating, precarious, or deteriorating)

b. **Experiencing an acute episode, or a flare-up of a recurrent or chronic problem**

c. **End-stage disease, 6 or fewer months to live**

8. SELF-REPORTED HEALTH

Ask: "In general, how would you rate your health?"

0. Excellent
1. Good
2. Fair
3. Poor
8. Could not (would not) respond

9. TOBACCO AND ALCOHOL

a. **Smokes tobacco daily**

0. No
1. Not in last 3 days, but is usually a daily smoker
2. Yes

b. **Alcohol**—Highest number of drinks in any "single sitting" in LAST 14 DAYS

0. None
1. 1
2. 2-4
3. 5 or more

SECTION K. ORAL AND NUTRITIONAL STATUS

1. HEIGHT AND WEIGHT [INCHES AND POUNDS– COUNTRY SPECIFIC]

Record (a.) height in inches and (b.) weight in pounds. Base weight on most recent measure in LAST 30 DAYS.

a. **HT (in.)** ☐☐ b. **WT (lb.)** ☐☐☐

2. NUTRITIONAL ISSUES

0. No 1. Yes

a. **Weight loss of 5% or more in LAST 30 DAYS, or 10% or more in LAST 180 DAYS**

b. **Dehydrated or BUN / Cre ratio>25** [Ratio, country specific]

c. **Fluid intake less than 1,000 cc per day (less than four 8 oz cups/day)**

d. **Fluid output exceeds input**

3. MODE OF NUTRITIONAL INTAKE

0. ***Normal***—Swallows all types of foods
1. ***Modified independent***—e.g., liquid is sipped, takes limited solid food, need for modification may be unknown
2. ***Requires diet modification to swallow solid food***—e.g., mechanical diet (e.g., puree, minced, etc.) or only able to ingest specific foods
3. ***Requires modification to swallow liquids***—e.g., thickened liquids
4. ***Can swallow only pureed solids —AND— thickened liquids***
5. ***Combined oral and parenteral or tube feeding***
6. ***Nasogastric tube feeding only***
7. ***Abdominal feeding tube***—e.g., PEG tube
8. ***Parenteral feeding only***—Includes all types of parenteral feedings, such as total parenteral nutrition (TPN)
9. **Activity did not occur**—During entire period

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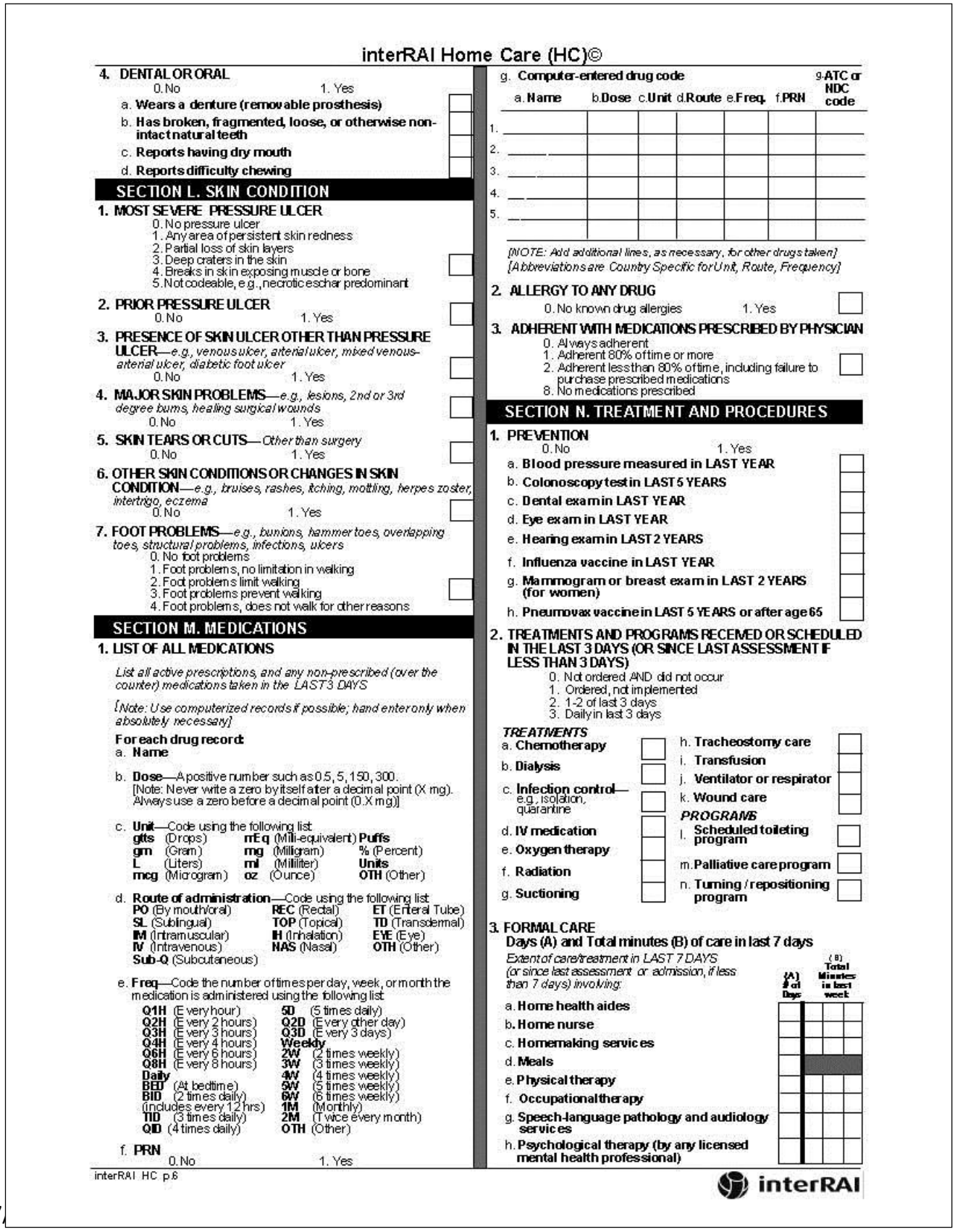
Look for physically disabled individuals who are functionally impaired, or who have acquired a cognitive loss, that results in the need for assistance



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4. DENTAL OR ORAL
0. No 1. Yes
a. **Wears a denture (removable prosthesis)**
b. **Has broken, fragmented, loose, or otherwise non-intact natural teeth**
c. **Reports having dry mouth**
d. **Reports difficulty chewing**

SECTION L. SKIN CONDITION

1. MOST SEVERE PRESSURE ULCER
0. No pressure ulcer
1. Any area of persistent skin redness
2. Partial loss of skin layers
3. Deep craters in the skin
4. Breaks in skin exposing muscle or bone
5. Not codeable, e.g., necrotic eschar predominant

2. PRIOR PRESSURE ULCER
0. No 1. Yes

3. PRESENCE OF SKIN ULCER OTHER THAN PRESSURE ULCER—*e.g., venous ulcer, arterial ulcer, mixed venous-arterial ulcer, diabetic foot ulcer*
0. No 1. Yes

4. MAJOR SKIN PROBLEMS—*e.g., lesions, 2nd or 3rd degree burns, healing surgical wounds*
0. No 1. Yes

5. SKIN TEARS OR CUTS—*Other than surgery*
0. No 1. Yes

6. OTHER SKIN CONDITIONS OR CHANGES IN SKIN CONDITION—*e.g., bruises, rashes, itching, mottling, herpes zoster, intertrigo, eczema*
0. No 1. Yes

7. FOOT PROBLEMS—*e.g., bunions, hammer toes, overlapping toes, structural problems, infections, ulcers*
0. No foot problems
1. Foot problems, no limitation in walking
2. Foot problems limit walking
3. Foot problems prevent walking
4. Foot problems, does not walk for other reasons

SECTION M. MEDICATIONS

1. LIST OF ALL MEDICATIONS

List all active prescriptions, and any non-prescribed (over the counter) medications taken in the LAST 3 DAYS

[Note: Use computerized records if possible; hand enter only when absolutely necessary]

For each drug record:
a. **Name**

b. **Dose**—A positive number such as 0.5, 5, 150, 300. [Note: Never write a zero by itself after a decimal point (X mg). Always use a zero before a decimal point (0.X mg)]

c. **Unit**—Code using the following list:
gtts (Drops) **mEq** (Mili-equivalent) **Puffs**
gm (Gram) **mg** (Milligram) **%** (Percent)
L (Liters) **ml** (Milliliter) **Units**
mcg (Microgram) **oz** (Ounce) **OTH** (Other)

d. **Route of administration**—Code using the following list:
PO (By mouth/oral) **REC** (Rectal) **ET** (Enteral Tube)
SL (Sublingual) **TOP** (Topical) **TD** (Transdermal)
IM (Intramuscular) **IH** (Inhalation) **EYE** (Eye)
IV (Intravenous) **NAS** (Nasal) **OTH** (Other)
Sub-Q (Subcutaneous)

e. **Freq**—Code the number of times per day, week, or month the medication is administered using the following list:
Q1H (Every hour) **5D** (5 times daily)
Q2H (Every 2 hours) **Q2D** (Every other day)
Q3H (Every 3 hours) **Q3D** (Every 3 days)
Q4H (Every 4 hours) **Weekly**
Q6H (Every 6 hours) **2W** (2 times weekly)
Q8H (Every 8 hours) **3W** (3 times weekly)
Daily **4W** (4 times weekly)
BED (At bedtime) **5W** (5 times weekly)
BID (2 times daily) (includes every 12 hrs) **6W** (6 times weekly)
TID (3 times daily) **1M** (Monthly)
QID (4 times daily) **2M** (Twice every month)
OTH (Other)

f. **PRN**
0. No 1. Yes

g. **Computer-entered drug code**

	a. Name	b. Dose	c. Unit	d. Route	e. Freq.	f. PRN	g. ATC or NDC code
1.							
2.							
3.							
4.							
5.							

[NOTE: Add additional lines, as necessary, for other drugs taken]
[Abbreviations are Country Specific for Unit, Route, Frequency]

2. ALLERGY TO ANY DRUG
0. No known drug allergies 1. Yes

3. ADHERENT WITH MEDICATIONS PRESCRIBED BY PHYSICIAN
0. Always adherent
1. Adherent 80% of time or more
2. Adherent less than 80% of time, including failure to purchase prescribed medications
8. No medications prescribed

SECTION N. TREATMENT AND PROCEDURES

1. PREVENTION
0. No 1. Yes
a. **Blood pressure measured in LAST YEAR**
b. **Colonoscopy test in LAST 5 YEARS**
c. **Dental exam in LAST YEAR**
d. **Eye exam in LAST YEAR**
e. **Hearing exam in LAST 2 YEARS**
f. **Influenza vaccine in LAST YEAR**
g. **Mammogram or breast exam in LAST 2 YEARS (for women)**
h. **Pneumovax vaccine in LAST 5 YEARS or after age 65**

2. TREATMENTS AND PROGRAMS RECEIVED OR SCHEDULED IN THE LAST 3 DAYS (OR SINCE LAST ASSESSMENT IF LESS THAN 3 DAYS)
0. Not ordered AND did not occur
1. Ordered, not implemented
2. 1-2 of last 3 days
3. Daily in last 3 days

TREATMENTS
a. **Chemotherapy**
b. **Dialysis**
c. **Infection control**—e.g., isolation, quarantine
d. **IV medication**
e. **Oxygen therapy**
f. **Radiation**
g. **Suctioning**
h. **Tracheostomy care**
i. **Transfusion**
j. **Ventilator or respirator**
k. **Wound care**

PROGRAMS
l. **Scheduled toileting program**
m. **Palliative care program**
n. **Turning / repositioning program**

3. FORMAL CARE
Days (A) and Total minutes (B) of care in last 7 days

Extent of care/treatment in LAST 7 DAYS (or since last assessment or admission, if less than 7 days) involving:

	(A) # of Days	(B) Total Minutes in last week
a. **Home health aides**		
b. **Home nurse**		
c. **Homemaking services**		
d. **Meals**		
e. **Physical therapy**		
f. **Occupational therapy**		
g. **Speech-language pathology and audiology services**		
h. **Psychological therapy (by any licensed mental health professional)**		

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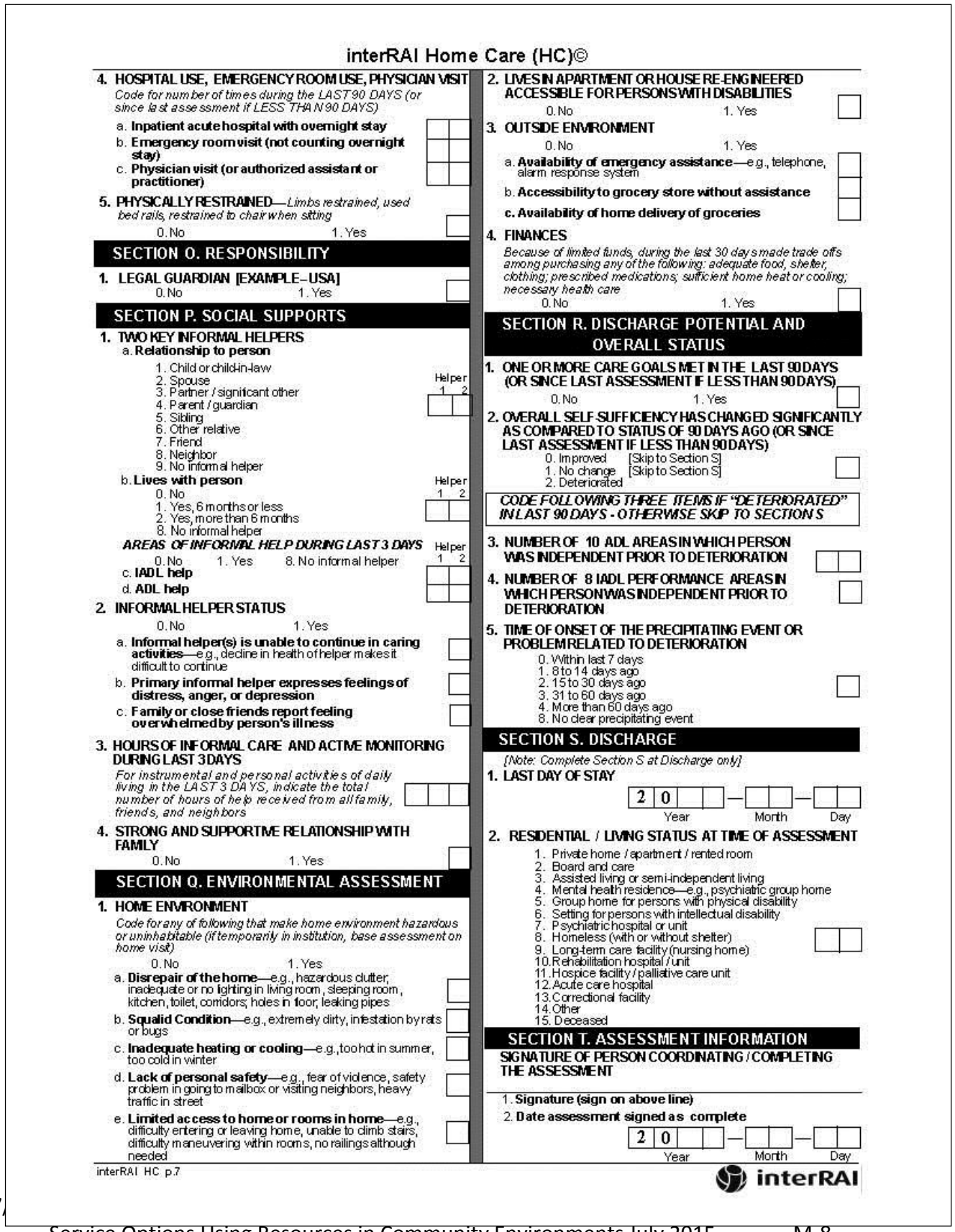

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4. HOSPITAL USE, EMERGENCY ROOM USE, PHYSICIAN VISIT
Code for number of times during the LAST 90 DAYS (or since last assessment if LESS THAN 90 DAYS)
a. **Inpatient acute hospital with overnight stay**
b. **Emergency room visit (not counting overnight stay)**
c. **Physician visit (or authorized assistant or practitioner)**

5. PHYSICALLY RESTRAINED—*Limbs restrained, used bed rails, restrained to chair when sitting*
0. No 1. Yes

SECTION O. RESPONSIBILITY

1. LEGAL GUARDIAN [EXAMPLE–USA]
0. No 1. Yes

SECTION P. SOCIAL SUPPORTS

1. TWO KEY INFORMAL HELPERS
a. **Relationship to person**
1. Child or child-in-law
2. Spouse
3. Partner / significant other
4. Parent / guardian
5. Sibling
6. Other relative
7. Friend
8. Neighbor
9. No informal helper
Helper 1 2

b. **Lives with person**
0. No
1. Yes, 6 months or less
2. Yes, more than 6 months
8. No informal helper
Helper 1 2

AREAS OF INFORMAL HELP DURING LAST 3 DAYS
0. No 1. Yes 8. No informal helper
Helper 1 2
c. **IADL help**
d. **ADL help**

2. INFORMAL HELPER STATUS
0. No 1. Yes
a. **Informal helper(s) is unable to continue in caring activities**—e.g., decline in health of helper makes it difficult to continue
b. **Primary informal helper expresses feelings of distress, anger, or depression**
c. **Family or close friends report feeling overwhelmed by person's illness**

3. HOURS OF INFORMAL CARE AND ACTIVE MONITORING DURING LAST 3 DAYS
For instrumental and personal activities of daily living in the LAST 3 DAYS, indicate the total number of hours of help received from all family, friends, and neighbors

4. STRONG AND SUPPORTIVE RELATIONSHIP WITH FAMILY
0. No 1. Yes

SECTION Q. ENVIRONMENTAL ASSESSMENT

1. HOME ENVIRONMENT
Code for any of following that make home environment hazardous or uninhabitable (if temporarily in institution, base assessment on home visit)
0. No 1. Yes
a. **Disrepair of the home**—e.g., hazardous clutter; inadequate or no lighting in living room, sleeping room, kitchen, toilet, corridors; holes in floor; leaking pipes
b. **Squalid Condition**—e.g., extremely dirty, infestation by rats or bugs
c. **Inadequate heating or cooling**—e.g., too hot in summer, too cold in winter
d. **Lack of personal safety**—e.g., fear of violence, safety problem in going to mailbox or visiting neighbors, heavy traffic in street
e. **Limited access to home or rooms in home**—e.g., difficulty entering or leaving home, unable to climb stairs, difficulty maneuvering within rooms, no railings although needed

2. LIVES IN APARTMENT OR HOUSE RE-ENGINEERED ACCESSIBLE FOR PERSONS WITH DISABILITIES
0. No 1. Yes

3. OUTSIDE ENVIRONMENT
0. No 1. Yes
a. **Availability of emergency assistance**—e.g., telephone, alarm response system
b. **Accessibility to grocery store without assistance**
c. **Availability of home delivery of groceries**

4. FINANCES
Because of limited funds, during the last 30 days made trade offs among purchasing any of the following: adequate food, shelter, clothing; prescribed medications; sufficient home heat or cooling; necessary health care
0. No 1. Yes

SECTION R. DISCHARGE POTENTIAL AND OVERALL STATUS

1. ONE OR MORE CARE GOALS MET IN THE LAST 90 DAYS (OR SINCE LAST ASSESSMENT IF LESS THAN 90 DAYS)
0. No 1. Yes

2. OVERALL SELF-SUFFICIENCY HAS CHANGED SIGNIFICANTLY AS COMPARED TO STATUS OF 90 DAYS AGO (OR SINCE LAST ASSESSMENT IF LESS THAN 90 DAYS)
0. Improved [Skip to Section S]
1. No change [Skip to Section S]
2. Deteriorated

CODE FOLLOWING THREE ITEMS IF "DETERIORATED" IN LAST 90 DAYS - OTHERWISE SKIP TO SECTION S

3. NUMBER OF 10 ADL AREAS IN WHICH PERSON WAS INDEPENDENT PRIOR TO DETERIORATION

4. NUMBER OF 8 IADL PERFORMANCE AREAS IN WHICH PERSON WAS INDEPENDENT PRIOR TO DETERIORATION

5. TIME OF ONSET OF THE PRECIPITATING EVENT OR PROBLEM RELATED TO DETERIORATION
0. Within last 7 days
1. 8 to 14 days ago
2. 15 to 30 days ago
3. 31 to 60 days ago
4. More than 60 days ago
8. No clear precipitating event

SECTION S. DISCHARGE

[Note: Complete Section S at Discharge only]

1. LAST DAY OF STAY
2 0 — — —
Year Month Day

2. RESIDENTIAL / LIVING STATUS AT TIME OF ASSESSMENT
1. Private home / apartment / rented room
2. Board and care
3. Assisted living or semi-independent living
4. Mental health residence—e.g., psychiatric group home
5. Group home for persons with physical disability
6. Setting for persons with intellectual disability
7. Psychiatric hospital or unit
8. Homeless (with or without shelter)
9. Long-term care facility (nursing home)
10. Rehabilitation hospital / unit
11. Hospice facility / palliative care unit
12. Acute care hospital
13. Correctional facility
14. Other
15. Deceased

SECTION T. ASSESSMENT INFORMATION

SIGNATURE OF PERSON COORDINATING / COMPLETING THE ASSESSMENT

1. **Signature (sign on above line)**
2. **Date assessment signed as complete**
2 0 — — —
Year Month Day

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