Appendix 30A ▪ Functional Needs Assessment Grid Instructions

The following instructions are intended to be a guide to assist with the assessment of the functional needs of participants. Care managers should use their clinical judgment, observations, and information gathered during the assessment process when making a selection.

Eating

Reaching for, picking up, grasping utensil and cup; getting food on utensil, bringing food, utensil, cup to mouth, chewing, swallowing food and liquids, manipulating food on plate. Cleaning face and hands as necessary following a meal.

Independent:	Able to feed self.
Verbal Cueing:	Able to feed self but needs verbal reminder or encouragement to eat.
Stand-by Assist:	Assistance needed during the meal (e.g., to apply assistive device, get beverage or push more food to within reach, etc.), but constant presence of another person not required.
Hands-on Assist:	Able to feed self certain foods, but cannot cut food or hold utensils, cups, glasses, etc., and requires constant presence of another person.
Dependent:	Unable to feed self at all and is completely dependent upon assistance from another person.
Paramedical:	Is tube-fed. All aspects to tube feeding are evaluated as a Paramedical Service.

Dressing

Putting on and taking off, fastening and unfastening garments and undergarments, special devices such as back or leg braces, corsets, elastic stockings and artificial limbs or splints.

Independent:	Able to put on, fasten and remove all clothing and devices without assistance. Clothes self appropriately for health and safety.
Verbal Cueing:	Able to dress self but requires verbal reminding or directions with clothing selection.
Stand-by Assist:	Able to dress self in most clothing, but may require assistance with tying shoes, buttoning, zipping, putting on stockings or brace, etc. on an as-needed basis.
Hands-on Assist:	Unable to dress self completely, without the help of another person (e.g., tying shoes, buttoning, zipping, putting on stockings or brace,

etc.). Unable to put on most clothing items by self. Without assistance would be inappropriately or inadequately clothed.

Dependent: Unable to dress self at all. Requires complete assistance from another person.

Transfer

Moving from one sitting or lying position to another sitting or lying position (e.g., from bed to or from a wheelchair, or sofa, coming to a standing position and/or repositioning to prevent skin breakdown). (Note: if pressure sores have developed, the need for care of them is evaluated as a Paramedical Service.)

Independent: Able to do all transfers safely without assistance from another person.

Verbal Cueing: Able to transfer but needs verbal encouragement or direction.

Stand-by Assist: Requires some help from another person or an assisted device at times (e.g., requires a boost or assistance with positioning), requires an assistive device (e.g., cane or walker), to complete task safely.

Hands-on Assist: Unable to complete most transfers without physical assistance from another person. Would be at risk if unassisted.

Dependent: Totally dependent upon another person for all transfers. Must be lifted or mechanically transferred.

Bathing

Bathing means cleaning the body using a tub, shower or sponge bath including getting a basin of water, managing faucets, getting in and out of a tub, reaching head and body parts for soaping, rinsing and drying.

Independent: Able to bathe self safely without help from another person.

Verbal Cueing: Able to bathe self with verbal direction or intermittent monitoring. May need verbal reminder to maintain personal hygiene.

Stand-by Assist: Generally able to bathe self but needs some assistance.

Hands-on Assist: Requires direct assistance with most aspects of bathing. Would be at risk if left alone.

Dependent: Totally dependent on others for bathing.

Toileting

Able to move to and from, on and off toilet or commode, empty commode, manage clothing and wipe and clean body after toileting, use and empty bedpans, ostomy and/or catheter receptacles and urinals, apply diapers and disposable barrier pads. (Note:

catheter insertion, ostomy irrigation and bowel program are evaluated as Paramedical Services).

Independent: Able to manage bowel and bladder care with no assistance from another person.

Verbal Cueing: Requires verbal reminder and/or direction only.

Stand-by Assist: Requires minimal assistance with certain activities; the presence of another person is recommended to supervise and intervene if necessary.

Hands-on Assist: Unable to carry out most activities without hands-on assistance of caregiver or family.

Dependent: Requires physical assistance in all areas of care. Would be at risk if left alone.

Paramedical: Needs Paramedical Services (e.g., catheter insertion, ostomy irrigation, bowel program).

Grooming

Grooming includes hair combing and brushing, shampooing, oral hygiene, shaving and fingernail and toenail care (unless toenail care is medically contraindicated and therefore is evaluated a Paramedical Service).

Independent: Able to bathe and groom self safely without help from another person.

Verbal Cueing: May need verbal reminders to maintain personal grooming.

Stand-by Assist: Generally able to groom self but needs some assistance.

Hands-on Assist: Requires direct assistance with most aspects of grooming. Would be at risk if left alone.

Dependent: Totally dependent on others for grooming.

Paramedical: Participant needs skilled practitioner to perform grooming that is medically contraindicated (e.g., toenail care when self-care is medically contraindicated, diabetics or others needing podiatry care).

Medications

Physically and mentally able to identify, handle, and consume (swallow, inject, instill or insert) the correct amount of the prescribed medication at the specified time according to a doctor's prescription.

Independent: Can self-administer prescribed medication without any assistance.

Verbal Cueing: Able to perform tasks but needs verbal direction, guidance or reminder to do it, without risk to safety.

Stand-by Assist: Generally able to self-administer but needs some assistance on an as needed basis, or to monitor for safety.

Hands-on Assist: Cannot perform some parts of this function. May require assistance with measurement, administration (e.g., injections), or organization (e.g., setting up a pill organizer).

Dependent: Cannot perform any part of this function. May require all liquid or injected medication due to swallowing problems or non-cooperative behaviors.

Paramedical: Requires medications (e.g., chemotherapy, pain control or others) injected intravenously via through IV, shunt, or gastrointestinal/jejunum tube. All aspects of administration of these medications are evaluated as a Paramedical Service.

Stair Climbing

Lifting feet, holding handrail and negotiating stairs from outside to inside, and from one interior level to another (from 2 or 3 to as many as 12 to 15 steps).

Independent: Physically and mentally able to negotiate stairs from ground level to first floor or from first to second floor without assistance or risk to safety.

Verbal Cueing: Able to negotiate steps but may need verbal reminder to watch steps or hold handrail.

Stand-by Assist: Able to negotiate steps independently or with use of handrail. May be a fall-risk and could benefit from someone on stand-by to help balance or steady the person as needed.

Hands-on Assist: Able to negotiate steps with use of handrail and the assistance of someone helping to balance or steady the person. Able to negotiate only a small number of steps (e.g., ground-level to first floor or two to three steps between levels), with considerable help from another person to lift foot and lift body to next step.

Dependent: Unable to negotiate any stairs inside or outside, must be carried in chair or on gurney (or stretcher) to go from one level to another.

Mobility Indoor

Walking or moving inside; moving from one area of indoor space to another without necessity of handrails. Can respond adequately to the presence of obstacles that must be stepped around. Includes ability to go from inside to outside and back (exclusive of stair climbing, see separate function).

Independent: Requires no physical assistance from another, although person may be slow or experience some difficulty or discomfort. Getting to and from where she/he wants to go can be accomplished safely.

Verbal Cueing: Can move inside with verbal encouragement or reminders to watch for steps or to use a cane or walker.

Stand-by Assist: Requires intermittent physical assistance from another person to negotiate a wheelchair, or to steady the person or guide them in the desired direction.

Hands-on Assist: Requires constant attention from another person; at risk of being lost or unsafe if not accompanied.

Dependent: Unable to move about; must be carried, lifted, or pushed in a wheelchair or on a gurney at all times.

Mobility Outdoor

Walking or moving around outside, moving from one area of outdoor space to another or walking on the sidewalk or path without necessity of handrails. Can respond adequately to uneven sidewalk, or the presence of obstacles that must be stepped around. Includes ability to go from inside to outside and back (exclusive of stair climbing, see separate function).

Independent: Requires no physical assistance from others although person may be slow or experience some difficulty or discomfort. Getting to and from where she/he wants to go can be accomplished safely.

Verbal Cueing: Can move outside with verbal encouragement or reminder to watch steps or to use a cane or walker.

Stand-by Assist: Requires intermittent physical assistance from another person to negotiate a wheelchair, or to steady the person or guide them in the desired direction.

Hands-on Assist: Requires constant attention from another person, at risk of being lost or unsafe if not accompanied.

Dependent: Unable to move about outside. Must be carried, lifted, or pushed in a wheelchair or on a gurney at all times.

Housework

Sweeping, vacuuming, and washing floors; washing kitchen counters and sinks; cleaning the bathroom; storing food and supplies; taking out garbage; dusting and picking up; cleaning oven and stove; cleaning and defrosting refrigerator; bringing in fuel for heating or cooking purposes from a fuel bin in the yard; changing bed linen.

Independent: Able to perform all domestic chores without a risk to health and safety.

Verbal Cueing: Able to perform tasks but needs verbal direction or encouragement from another person.

Stand-by Assist: Able to perform tasks but may require stand-by assistance from another person for some chores (e.g., has limited endurance or limitations in bending, stooping, reaching, etc.).

Hands-on Assist: Requires intermittent physical assistance from another person for some chores (e.g., has limited endurance or limitations in bending, stooping, reaching, etc.). Requires assistance from another person for most chores. May be able to perform a few chores (e.g., dust furniture or wipe counters).

Dependent: Totally dependent upon others for all domestic chores.

Laundry

Gaining access to machines, sorting, manipulating soap containers, reaching into machines, handling wet laundry, operating machine controls, hanging laundry to dry, folding and storing.

Independent: Able to perform all chores.

Verbal Cueing: Able to complete chores with verbal reminder from another person.

Stand-by Assist: Able to complete most chores. Requires stand-by assistance with some tasks including reaching into machines, lifting clothing into machines, etc. to avoid injury.

Hands-on Assist: Requires intermittent assistance with some tasks. Requires assistance with most tasks. May be able to do some laundry tasks (e.g., hand wash underwear, fold and/or store clothing) by self or under supervision.

Dependent: Unable to perform any tasks; is completely dependent on assistance from another person.

Shopping and Errands

Compile list, bending, reaching, and lifting, managing cart or basket, identifying items needed, transferring items to home, putting items away, phoning in and picking up prescriptions, and buying clothing.

Independent: Can perform all tasks without assistance.

Stand-by Assist: Can perform most tasks. May need intermittent assistance lifting, bending, reaching, managing cart or baskets, transferring items to home, putting items away, etc. on an as-needed basis.

Hands-on Assist: Requires the assistance of another person for most tasks (e.g., help with major shopping needed), but participant can go to nearby store for small items.

Dependent: Unable to perform any tasks; is completely dependent on assistance from another person.

Meal Preparation and Cleanup

Planning menus. Washing, peeling, slicing vegetables, opening packages, cans and bags, mixing ingredients, lifting pots and pans, re-heating food, cooking, safely operating stove, setting the table, serving the meal, cutting food into bite-sized pieces. Washing, drying, and putting away the dishes.

Independent: Can plan, prepare, serve and clean up meals.

Verbal Cueing: Needs only verbal reminder or guidance in menu planning, meal preparation, and/or cleanup.

Stand-by Assist: Requires another person to prepare and clean up main meals on less than a daily basis (e.g., can reheat food prepared by someone else, can prepare simple meals) and/or needs help with cleanup on a less than daily basis.

Hands-on Assist: Requires another person to prepare and clean up main meal(s) on a daily basis.

Dependent: Completely dependent on another person to prepare and clean up all meals.

Transportation

The individual's ability to obtain transportation to and from the grocery store, pharmacy, or medical appointments, etc. is assessed as follows:

Independent: The individual is able to arrange and access transportation on their own, including scheduling rides, driving, or using public transit without assistance.

Verbal Cueing: The individual can use transportation but requires reminders, prompts, or directions (e.g., reminders to schedule a ride, guidance on navigating a bus route).

Stand-by Assist: The individual is able to use transportation but needs someone nearby for safety, reassurance, or occasional support (e.g., ensuring correct bus stop or confirming arrival).

Hands-On Assist: The individual requires physical support or direct help to access transportation (e.g., assistance entering and exiting a vehicle, help with seatbelts, or being escorted through a transit station).

Dependent: The individual is unable to arrange or access transportation on their own and relies entirely on another person to provide or coordinate transportation.

Paramedical: The individual requires specialized medical transport due to medical or physical needs (e.g., gurney transport for bariatric, non-ambulatory, or bedbound individuals; ambulance-level support for continuous medical monitoring during transit).

Telephone

Obtains number, dials, handles receiver, can speak and hear response, and terminates call, may include use of instrument with loudspeaker or hearing devices. Can be expected to use telephone during emergency situations to call 911 or other help.

Independent: Can obtain and dial number, handle receiver, terminate call and replace receiver without assistance.

Verbal Cueing: Needs only verbal reminder on how to use the phone, or how to get the number. May need to be encouraged to use the phone.

Hands-on Assist: Needs assistance to obtain a number or dial but can carry on conversation once the other party is reached; can terminate a call.

Dependent: Unable to use phone at all. Unable to conduct conversation on phone for either physical or mental reasons.

Money Management

Physically and mentally handles the receipt of monies, expenditures, and receipt and payment of bills in a timely and correct manner.

Independent: Handles all financial matters without risk of eviction, turn-offs and other "failure to pay" related problems.

Verbal Cueing: Is able to perform all financial transactions but may need to be reminded to pay bills or obtain cash from bank.

Hands-on Assist: For either physical or mental reasons, may need intermittent assistance in doing banking, writing checks or other isolated elements of financial transactions.

Dependent: Unable to attend to any part of the necessary financial transactions to receive and disburse funds to meet daily needs.