

(09/07/2017)

COMBINED ASSESSMENT

Outreach	_____	A+D
Options Counseling I&A	_____	A+D
If OC, under 60 & disabled	_____	A+D
Home Mod	_____	A+C+D
Care Receiver 60+	_____	A+B+D (C)
NP Age 55+	_____	B+D (C)
NP Under Age 55	_____	B+D (C)
(C) = gap if applicable		

A: SENIOR/DISABLED Name _____

Address _____

City _____ Phone # _____

Low-Income: Yes No Race _____ Birth Date _____ Veteran: Yes No

Gender: Male Female Number in Household _____ Language if other than English _____

Emergency contact _____ Phone # _____

Concerns (circle all that apply): Abuse, Dementia, Employment, Finances, Food, Health, Housing, In-home help, Legal, Medical, Med Mgmt, Mental Health, Mobility, Transportation, Social Supports, Other: _____

If circled, explain as necessary: _____

Could their concerns be met by a volunteer? Yes No

Living Arrangement

Family lives in Area: Yes No

If Consumer lives with others, how many of them are financially dependent on Consumer _____

Dwelling Condition/Barriers

Mental Status

Alert _____
Variable _____
Confused _____

Physical

Limitations
Frail _____
Speech _____
Hearing _____
Vision _____
Mobility _____

Needs Asst With

Meals _____
House cleaning _____
Personal Care _____
Laundry _____
Shopping _____
Money Mgmt _____

Services Currently Receiving

In-Home Care _____
ADS _____
Emer Response _____
Money Mgmt. _____
VA _____
Other _____

Cong. meals _____
Delivered meals _____
Transportation _____
Senior Center _____
SNAP _____

Legal Asst. _____
Case Mgmt. _____
Home Health _____
Caregiver _____
TANF _____

If potential abuse, neglect, exploitation, date of referral to Shawnee Alliance (1-800-642-7773) _____

Ability to Leave Home

Homebound _____
Leaves home _____

If Leaves Home

Drives auto _____
Uses public transit _____
Friend/family drives _____

B: CAREGIVER/NON-PARENT Note: Caregiver is a family member caring for someone age 60+ and a Non-Parent is someone caring for their relatives children.

Caregiver/NP Name _____

Address _____ City _____ Veteran: Yes No

Phone # _____ Relationship to care receiver(s) _____

Does the Caregiver/Non-Parent . . . Live with the care receiver(s) Yes No

Caregiver/NP gives care Daily Weekly Other _____

Respite needed (In-Home or ADS) Yes No If yes, complete NAPIS form for both caregiver & care receiver(s)

Need someone to talk to (Healthy Ideas) Yes No If yes, date referred to Shawnee _____

Was information given on: SNAP (food stamps): Yes No Medical Card: Yes No TANF grant: Yes No

If the Caregiver does not live with the care receiver, does the care receiver need a visit & assessment? Yes No

Briefly describe other needs or concerns of the Caregiver/Non-Parent _____

If a Non-Parent, are parents incarcerated. Yes No If yes (circle): one both

Number of Children: _____ Children's Ages: _____

If a Non-Parent, is NP age 55+ Yes No

C: FOR HOME MODIFICATION & GAP FILLING

Which service: Home Mod _____ Gap Filling _____

Describe Need: _____

Who will pay if cost exceeds max amount? _____

Is the recipient affiliated with your agency Yes _____ No _____ (if yes, call EAAA for prior approval)

Circle what other sources that were explored: Insurance Medicaid Medicare Community Funds Other agency

If this is a utility bill payment, explain how this need will be paid in the future _____

Senior/caregiver/NP signs below if satisfied with the Home Mod/Gap Filling service:

Signature of senior/caregiver/NP _____ Date _____

D: SENIOR/DISABLED/CAREGIVER/NP'S STATED GOAL(S)

Staff's Action Steps needed to address their stated goal(s).

Staff's Follow-Up Steps needed to address their stated goals (required).

Signature of Staff _____ Date _____

File: (F): / Forms / Provider Forms / III-B & E Combined Assessment Form

INSTRUCTIONS FOR COMBINED ASSESSMENT FORM

1. The Assessment takes place face-to-face or by phone (face-to-face is preferred in order to get a fuller understanding of the Consumer's issues). The Assessment may take place in the Senior/Caregiver/NP's home, senior center, ADRC, or other appropriate place.
2. The informant is usually the senior adult, but their caregiver or a non-parent raising the children of their relatives can be the informant if it is more appropriate for the Assessment process.
3. Mark in the type of Assessment (Outreach, Option Counseling I&A, Home Mod, etc.) in the top-right box
4. Use codes in top-right box to determine the sections to complete.
5. On page 1 at the top, enter the senior/disabled person's name, address, and other demographics. If necessary, an estimated age can be used.
6. Circle the issues that the senior/disabled person wants to address. Briefly state their issues if needed for clarity. Complete the middle sections for the senior/disabled person.
7. Complete "B. For Caregiver/Non-Parent" section, *if applicable*. The following refers to this section.
 - a. Caregivers of older people may be family members, spouse, adult child, a close family friend, or a companion. Caregivers must be age 18 and over.
 - Do not include paid caregivers that are not family.
 - Caregivers must have assumed some caregiving role that they carry out on a regular basis.
 - Grandchildren, or children cared for by older relatives, must be age 18 or younger.
 - b. In the "Does the Caregiver / Non-Parent:" subsection, the answers will depend on your understanding of the caregiving situation. Does the Care Receiver have Alzheimer's, or congestive heart failure, or severe arthritis, or have they had a stroke, etc.? How is the Caregiver dealing with the situation, and what are their needs? Their needs as Caregivers are going to be affected by what type of problems the Care Receiver has, and by their own level of abilities and knowledge.
 - c. What types of resources can be offered to this Caregiver based on the information given? Think not only about the aging network services, but also about other agencies' services, as well as brochures, websites, training that may be offered.
 - d. Make a special effort to have materials and information available for Non-Parents raising children, such as the EAAA Resource Guide for GRG, referral to the Childcare Resource Centers or other. Remember that Gap Filling can also be used in Non-Parent (NP) situations.
9. If the Caregiver and Care Receiver do not live together, a separate Home Visit & Assessment can be completed for both. This would generate two units of Outreach/Assessment, one under III-B and one under III-E.
10. On page 2, complete "C. Home Modification & Gap Filling" section, *if applicable*. Senior/caregiver/NP signs to indicate satisfaction with Home Mod/Gap.
11. On page 2, complete "D. Senior/Disabled/Caregiver/NP's Stated Goal(s)," by rephrasing their expected outcomes/goals.
12. On page 2, complete "Staff Action Steps," by listing the actions you/your agency needs to take to help them reach their outcome/goals.
13. On page 2, complete "Staff's Follow-Up Steps," by listing the follow-up steps you/your agency needs to take to ensure they have met their outcomes/goals.

DEFINITIONS FOR I&A, OC I&A, and OUTREACH (III-B & III-E)

1. **I&A** (original) service is initiated by the Consumer, occurs face-to-face or by phone, occurs at the Consumer's home, caregiver's home, senior center, ADRC, or other appropriate place, and is not complicated, i.e., does not take a long time to resolve. This Combined Assessment form **IS NOT** required.
 - a) One unit of service for I&A (original) is generated per "Consumer initiated" contact. A follow-up contact made to confirm the information solved / was solving the issue(s) could be counted as one additional unit of original I&A. Note: I&A units do not include information given about regular senior center services/activities.
Example #1: A Consumer calls the center and while giving him / her information requested, the Counselor realizes that the Consumer needs to know about other services. The additional information is explained to

the caller by the Counselor. All of this takes just a few minutes to complete. The additional information given does not generate a second unit of I&A since it happened on the same contact. A follow-up contact made to confirm the information solved / was solving the issue(s) could be counted as one additional unit of original I&A.

Example #2: The counselor completes a BAA or SHAP activity for a Consumer. Sometime later, the Consumer asks the Counselor to check on the status of the application and/or mail the BAA certificate. Even though this may be a follow up, only one unit of I&A under SHAP I&A can be counted.

B. **Options Counseling I&A** is usually initiated by the Consumer (can be a referral), occurs face-to-face or by phone; occurs at the Consumer's home, caregiver's home, senior center, ADRC, or other appropriate place; and is complicated, i.e., takes a longer time to resolve. The Combined Assessment form **IS** required.

- a) One unit of service for Options Counseling I&A is generated per "Consumer initiated" contact when an Assessment is completed. A follow-up contact made to confirm the information solved / was solving the issue(s) could be counted as one additional unit of Options Counseling I&A.
- b) The Combined Assessment form must be completed for each Options Counseling I&A. When an Assessment was previously completed during the same fiscal year, but the Consumer's circumstances have substantially changed (health issues, grandchildren moved in, etc.), a new Combined Assessment is completed and an additional unit(s) may be counted.

Example #3: A Consumer calls the center and while giving him / her information requested (a unit of original I&A could be counted), the Counselor realizes that the Consumer has more issues, they are complicated, and they will take a longer time to address. The Counselor completes the Combined Assessment form about all of the issues faced by the Consumer. The Consumer's goal(s) are determined and action steps are developed for the Consumer and Counselor to follow. All this takes a long time to complete and does not generate a second unit of original I&A since it happened on the same contact, but does generate a unit of Options Counseling I&A with an Assessment. A follow-up contact made to confirm the information solved / was solving the issue(s) could be counted as one additional unit of Options Counseling I&A.

C. **Outreach** is initiated by the Outreach provider agency. The Combined Assessment **IS** required.

- a) One Outreach unit is generated by each "agency-initiated" contact with a different Consumer. A follow-up contact made to confirm the initial information could be counted as one additional unit.
- b) The Assessment form must be completed for each Consumer. When an Assessment was previously completed in the same year, and the Consumer's circumstances remain the same, a note of this is made in the Consumer's file or a new Assessment form may be completed. A new Assessment form must be completed annually for contacts with same consumer. The agency-initiated first contact may not occur over the telephone. However, the agency-initiated contact may occur in a senior center.

Example #4: The Counselor goes out to see a Consumer. The Counselor gives the Consumer general information on programs and encourages the consumer to participate. The Consumer asks about a new program they heard about and asks to be signed up for several programs discussed by the Counselor. The Counselor completes an Assessment and makes the appropriate referrals. All of this would be counted as one unit of Outreach. If a follow-up is made to check on Consumer, then a second unit is counted.

Example #5: The Counselor learns about a new program. A visit is made to a Consumer who could benefit from this program. The Consumer was previously seen by the Counselor within the current fiscal year and one unit of Outreach has already been counted. The Counselor tells the Consumer about the new program that could meet their goal(s). A second unit of Outreach is counted for the second visit.

Example #6: A Consumer calls the senior center and requests information on a program. The Counselor realizes that this Consumer may have other needs and an Outreach visit would be advisable. The Counselor arranges for a visit with the Consumer to give the information requested. While giving the Consumer the information originally requested, the Counselor also gives the Consumer information on other programs available and gathers enough Consumer information during the visit to complete the Combined Assessment form.

There were two contacts made with this Consumer, the Consumer called the center and the counselor made a visit. One unit of I&A (original) can be counted because the original request was from the Consumer and this information was given. One unit of Outreach can also be counted since the Counselor made visit, gave information on other programs and services, and completed the Combined Assessment form.