

## 2018 Consumer In-Home Services Assessment Form

Updated March 1, 2018

<b>Basic Client Information:</b>		<b>Date of Assessment:</b> /    /	
*Last Name:		*First Name:	Middle Initial:
*Gender: <input type="checkbox"/> Male <input type="checkbox"/> Female <input type="checkbox"/> Other		*Date of Birth:    /    /	*Age:
<b>Residential Address:</b>			
*Address Line 1:		*Address Line 2(Apt #, Unit #, Floor #):	
*City:		*State:	*Zip:
*County:		Phone (Home):	
Phone (Mobile):		Phone (Work):	
Location Comments (Directions):			
Email Address:		Are you receiving Medicaid? <input type="checkbox"/> Yes <input type="checkbox"/> No	
What is your marital status? <input type="checkbox"/> Married/Domestic Partner <input type="checkbox"/> Single <input type="checkbox"/> Widowed		Are you a veteran? <input type="checkbox"/> Yes <input type="checkbox"/> No	
*Lives : <input type="checkbox"/> Alone <input type="checkbox"/> With others		What is your primary language?	
*What is your race?		*Ethnicity? <input type="checkbox"/> Hispanic/Latino <input type="checkbox"/> Not Hispanic/Latino	
*Are you visually impaired (cannot be corrected with glasses)? <input type="checkbox"/> Yes <input type="checkbox"/> No			
Do you wear glasses/contacts? <input type="checkbox"/> Yes <input type="checkbox"/> No		Do you have hearing problems? <input type="checkbox"/> Yes <input type="checkbox"/> No	
How many people live in your household?			
What is your monthly individual income?		What is your monthly household income?	
*What is your monthly income range?		*What is you and your spouse's combined monthly income range?	
<input type="checkbox"/> \$1,012 or less <input type="checkbox"/> \$1,013 to \$1,265 <input type="checkbox"/> \$1,266 to \$1,871 <input type="checkbox"/> \$1,872 or more		<input type="checkbox"/> \$1,372 or less <input type="checkbox"/> \$1,373 to \$1,715 <input type="checkbox"/> \$1,716 to \$2,538 <input type="checkbox"/> \$2,539 or more	
<b>Mailing Address, if different from physical Address:</b>			
Address Line 1:		Address Line 2 (Apt #, Unit #, Floor #):	
City:	State:	Zip:	
Are you interested in receiving nutrition counseling? <input type="checkbox"/> Yes <input type="checkbox"/> No			
How did you hear about our services?			
<input type="checkbox"/> AAA Brochure <input type="checkbox"/> AAA Newsletter <input type="checkbox"/> Channel 9 Senior Source (TV) <input type="checkbox"/> Congregate Meal Site <input type="checkbox"/> From a Current Client <input type="checkbox"/> From a Friend/Relative <input type="checkbox"/> Senior Fair <input type="checkbox"/> Walk-In <input type="checkbox"/> Web Site <input type="checkbox"/> Other _____			

<b>Emergency Contacts:</b>	<b>First and Last Name</b>	<b>Phone Number</b>	<b>Relationship</b>		
POA (if applicable):					
Primary Contact:					
Type of Power of Attorney:					
Secondary Contact:					
Primary care physician:					
Caregiver (if applicable):					
<b>Client's Mobility and Health Conditions:</b>		<b>Client's Home Condition and Pets:</b>			
<p>Does the client use any mobility devices?  <input type="checkbox"/>None <input type="checkbox"/>Ambulatory <input type="checkbox"/>Cane <input type="checkbox"/>Crutches <input type="checkbox"/>Electric Scooter  <input type="checkbox"/>Walker <input type="checkbox"/>Wheelchair <input type="checkbox"/>Other: _____</p> <p>Is the client memory impaired? <input type="checkbox"/>Yes <input type="checkbox"/>No</p> <p>Has the client been diagnosed as being diabetic? <input type="checkbox"/>Yes <input type="checkbox"/>No</p> <p>Does the client use oxygen? <input type="checkbox"/>Yes <input type="checkbox"/>No</p> <p>Does the client use incontinence supplies? <input type="checkbox"/>Yes <input type="checkbox"/>No</p> <p>Does the client need supervision? <input type="checkbox"/>Yes <input type="checkbox"/>No</p> <p>Does the client have any of the following disabilities?  <input type="checkbox"/>Autism <input type="checkbox"/>Epilepsy/Seizure disorder <input type="checkbox"/>Intellectual disability  <input type="checkbox"/>Other: _____</p>		<p>Does the client smoke? <input type="checkbox"/>Yes <input type="checkbox"/>No</p> <p>Is the home in need of repair? <input type="checkbox"/>Yes <input type="checkbox"/>No</p> <p>If so, list what kind (especially if safety concern):  _____</p> <p>Are there any pets in the household? <input type="checkbox"/>Yes <input type="checkbox"/>No</p> <p>If so, what pets does the client have?  _____</p> <p>Any vicious pets (threat to in-home help)? <input type="checkbox"/>Yes <input type="checkbox"/>No</p> <p>Other helpful information regarding home condition or pets :  _____  _____</p>			
<b>Nutrition Checklist:</b>			<b>Yes</b>	<b>No</b>	<b>Yes Score</b>
*I have an illness or condition that made me change the kind and/or amount of food I eat.					2
*I eat fewer than 2 meals per day.					3
*I eat few fruits or vegetables or milk products.					2
*I have 3 or more drinks of beer, liquor, or wine almost every day.					2
*I have tooth or mouth problems that make it hard for me to eat.					2
*I don't always have enough money to buy the food I need.					4
*I eat alone most of the time.					1
*I take 3 or more different prescribed or over the counter drugs a day.					1
*Without wanting to, I have lost or gained 10 pounds in the last 6 months.					2
*I am not always physically able to shop, cook and/or feed myself.					2

What is the consumer's nutritional risk score? Total 'Yes' Score: \_\_\_\_\_  
 (0-2 = No Risk 3-5 = Moderate Risk 6 or more = High Risk)

**ADLs and IADLs required to determine eligibility for in-home services:**

ADLs (Activities of Daily Living)	Yes	No	IADLs (Instrumental Activities of Daily Living)	Yes	No
*I can bathe myself without help.			*I can manage money without help.		
*I can dress myself without help.			*I can take care of shopping without help.		
*I can get around inside my home without help.			*I can take my medication without help.		
*I can use the toilet without help.			*I can prepare meals without help.		
*I can eat without help.			*I can do ordinary housework without help.		
*I can get in and out of bed/chairs without help.			*I can use the telephone without help.		
			*I can use transportation without help.		

What is the consumer's ADL count? **Total 'No' Score:** \_\_\_\_\_  
 Are you receiving assistance with ADLs or IADLs from anyone? Yes No

What is the consumer's IADL count? **Total 'No' Score:** \_\_\_\_\_  
 From whom are you receiving assistance with ADLs and or IADLs? \_\_\_\_\_

**Other Eligibility Criteria:**

	Yes	No
*Does the client require Home Health Aide based on orders from a physician?		
*Is the client homebound or in a geographically isolated location to justify home delivered meals?		
*Can the client perform chore activities without help?		
*Comment on the client's inability to perform chore services:		
*Does the client have cognitive impairment? <input type="checkbox"/> None <input type="checkbox"/> Mild <input type="checkbox"/> Moderate <input type="checkbox"/> Severe (Requires assistance in routine situations due to lack of cognitive functioning)		

*I have been informed of the policies regarding voluntary contributions, complaint procedures and appeal rights. I am aware that in order to receive requested services, it may be necessary to share information with other departments or service provider and I herewith give my consent to do so.  
 (If filled out by assessor or via phone, please have assessor check here and sign below ).*

Signature \_\_\_\_\_ Date \_\_\_\_\_

**Office use only:** Information filled out by \_\_\_\_\_ Date \_\_\_\_\_

## **Please read the following information concerning this Intake Form and Complaint/Grievance Procedure:**

We are asking you to complete the attached form to the best of your knowledge so we understand how you would like to receive services. Some basic information (\*) is needed to meet compliance with federal and state reporting requirements and to target consumers age 60 and older who have the greatest economic and social need, such as individuals who are low-income minority, frail, and rural. Requests for services are processed as funds allow.

Your income level is not used to qualify you to receive services, but rather as a means to gather demographic data to various entities to show the need for continued funding of services. Nobody will contact you, unless you choose so in order to receive information about services which might be available to you.

If there is not enough room on the application for any of your responses, please attach a separate sheet.

### **Complaint/Grievance/Appeal Procedure:**

The purpose of the Complaint/Grievance/Appeal Procedure is

- To ensure fair and equitable treatment of all consumers, eliminate dissatisfaction, resolve problems and
- To establish complaint and appeals procedures that inform the consumers of their rights to complain and receive a written response at the provider level

Any OAA/OCA (Older Americans Act/Older Coloradans Act) eligible consumer who has a complaint/grievance with the organization asking you to fill out this assessment form has the right to file a complaint/grievance with said organization and, if not satisfied with the organization's decision, to appeal that decision with either the local AAA (Area Agency on Aging) or the SUA (State Unit on Aging).

The complete Complaint/Grievance/Appeal Procedure is available upon request by contacting your local AAA and/or the SUA as follows:

Office of Community Access and Independence  
Aging and Adult Services  
1575 Sherman Street, 10<sup>th</sup> Floor  
Denver, CO 80203  
(303) 866-2800 (Main Line)  
(303) 866- 2977 (Fax)  
(888) 866-4243 (Toll Free)

### **Contributions:**

Any person receiving services shall have the opportunity to contribute towards the cost of the service. No eligible person shall be denied a service because of their inability and/or choice not to contribute.

**KEEP THIS FORM FOR YOUR RECORDS**

## **Instructions about filling out the 2018 Consumer In-Home Services Assessment Form:**

This Consumer In-Home Services Assessment Form needs to be filled out by the AAAs or their providers to gather the information required by the federal or state government to be entered into Colorado's official data system (currently PeerPlace). In addition to register a client in PeerPlace, by entering date into the detailed consumer record, the rest of the required information needs to be entered into the assessment portion of PeerPlace.

(\*) Any fields with this prefix designate demographic data collected by the federal or state government to support the need for continued funding for the various programs. This data will be de-identified and used in aggregate form to compile statistical information. None of the data is sold to a third party and any personal information will only be used in an effort to better serve the client in providing him/her with services.

### **There are some required fields you need to be aware of when entering the assessment into PeerPlace:**

- The Workflows or Service types listed below require an In-Home Services Assessment; it makes no difference if the service is provided via a voucher where the client chooses the provider or via a provider that contracts with the AAA.
- The field 'Is the client's income level below the national poverty level?' is not on the form, but needs to be checked in the Financial section under Client Information in the In-Home Services Assessment when you enter the assessment into PeerPlace. Please check "Yes", if the income is in the first income range in either the individual or household monthly income range question; mark "No" otherwise.
- 'Is the client frail', which is in the Other Eligibility Criteria section of the assessment. Please check 'Yes' if the client has more than two ADLs or needs supervision due to cognitive impairment.
- A client has to be homebound to qualify for home delivered meals.

Any fields which do not have the (\*) prefix are optional ,but help determine in what other ways we might be able to help the client and to get feed-back about which of our outreach programs are successful. Please try to obtain as much information as possible, since we can only help when we know that there is a need.

While we ask you to make an honest effort to gather this basic information, we cannot deny services to clients on the basis of them refusing to provide the requested information, since our programs are not means tested. Since our programs are specifically for the elderly, particularly for persons age 60 or over, the date of birth needs to be filled in. If the client refuses to provide his/her date of birth, please enter 01/01/1901. Then, indicate in the General Comments "client refused to provide DOB, so the default date was entered".

This form must be used for clients receiving one or more of the service types under the following workflows. The clients have to be reassessed every six months (except for counseling and screening, the latter can be found under the Other workflow, for which the client needs to be assessed only once):

- Adult Day Care
- Case Management
- Chore
- Home Delivered Meals
- Home Health Aide
- Personal Care
- Service Type Screening under Other workflow (no reassessment required)

If you have any questions, please contact your local AAA office.