## INSTRUMENTAL ACTIVITIES OF DAILY LIVING

<table>
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<th>Activity</th>
<th>Options</th>
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| 1. Telephone: Ability to answer the phone, dial numbers, and effectively use the telephone to communicate during the last week. | 0 Does not have a telephone  
1 Independently uses telephone.  
2 Needs limited assistance placing calls but can answer.  
3 Needs extensive assistance answering the phone.  
4 Unable to answer but can listen with assistance  
5 Unable to use the telephone. |
| 2. Shopping: Ability to plan for, select, and purchase items in a store and to carry them home or arrange delivery during the last week. | 1 Independently performs shopping tasks.  
2 Able to do light shopping, but needs assistance for major shopping.  
3 Involved in planning activity but unable to go shopping.  
4 Unable to participate in activity. |
| 3. Housekeeping: Ability to safely and effectively perform light housekeeping and heavier cleaning tasks during the last week. | 1 Independently performs housekeeping tasks  
2 Able to perform only light housekeeping tasks.  
3 Needs supervision to perform housekeeping tasks.  
4 Needs assistance of another person to complete tasks.  
5 Unable to perform housekeeping tasks. |
| 4. Planning and Preparing Light Meals (e.g. cereal, sandwich) or reheat delivered meals during the last week. | 1 Independently prepares meals  
2 Needs assistance with meal preparation  
3 Unable to prepare any light meals or reheat any delivered meals. |
| 5. Laundry: Ability to do own laundry, to carry laundry to and from washing machine, to use washer and dryer, to wash small items by hand during the last week. | 1 Independently manages laundry tasks  
2 Needs assistance with laundry tasks.  
3 Unable to manage laundry tasks. |
| 6. Transportation: ability to safely use a car, taxi or public transportation (bus, train, subway) during the last week. | 1 Independently drives a regular or adapted car  
2 Needs assistance with transportation needs  
3 Unable to ride in private or public forms of transportation. |
| 7. Medications: Ability to prepare and take medications reliably and safely, including the correct dosage at the correct time during the last week. | 0 No medications prescribed.  
1 Independently manages medications.  
2 Needs assistance to take medications appropriately.  
3 Unable to take medications unless administered by another person. |
| 8. Ability to handle finances during the last week. | 1 Manages financial matters independently (budgets, writes checks, pays rent, bills, goes to bank) collects and keeps track of income.  
2 Manages day-to-day purchases, but needs assistance with banking, major purchases, etc.  
3 Unable to handle money. |
Adult Day Services Family-Intake Assessment

Last Name: ___________________________  First Name: _______________________  Date: _______________

Comments: ____________________________________________________________________________________________
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INSTRUMENTAL ACTIVITIES OF DAILY LIVING
FAMILY INTAKE ASSESSMENT

Instructions

This questionnaire asks the Care Giver to assess the client's ability to complete tasks that use instruments or objects to perform the activity. For each question the Care Giver will determine whether or not the client received help. Help in this instance means supervision, direction or personal assistance.

1. **Telephone: Ability to answer the phone, dial numbers, and effectively use the telephone to communicate during the last week.**
   
   An individual may not personally have a telephone or access to a telephone. Score as 0.

   Individual is independently able to dial numbers and answer calls appropriately and as desired **OR** may be able to use a specially adapted telephone (i.e. large numbers on dial, a TTY or TDD for people who are deaf) and calls essential numbers independently. Score as 1.

   Individual needs limited assistance if he/she is able to answer the phone and carry on a normal conversation but has difficulty with placing calls. Score as 2.

   Individual needs extensive assistance if he/she is able to answer the phone only some of the time or is able to carry on only a limited conversation and can not place calls. Score as 3.

   Individual is unable to answer the phone or place calls but can listen if assisted with equipment. Score as 4.

   Totally unable to use the telephone. Score as 5.

2. **Shopping: Ability to plan for, select, and purchase items in a store and to carry them home or arrange delivery during the last week.**

   Individual is able to independently plan for shopping needs and perform shopping tasks, including carrying packages **OR** is physically, cognitively and mentally able to take care of shopping, but has not routinely done shopping in the past. Score as 1.

   Individual is able to do light shopping and carry small packages but needs assistance with major shopping or unable to go alone but can go with someone to assist. He/she may be unable to maneuver a shopping cart or walk long distances. Individual is highly involved in activity. Score as 2.

   Individual is unable to go shopping but is able to identify items needed, place orders and arrange home delivery. Score as 3.
Individual is unable to participate in shopping tasks, needs someone to do all shopping and errands. Score as 4

3. **Housekeeping: Ability to safely and effectively perform light housekeeping and heavier cleaning tasks during the last week.**

   Individual is able to independently perform all housekeeping tasks OR is physically, cognitively and mentally able to perform housekeeping tasks but has not routinely done housekeeping in the past. Score as 1.

   Individual is able to perform only light housekeeping tasks (i.e. dusting, wiping the kitchen counters) independently. Score as 2.

   Individual is able to perform housekeeping tasks with intermittent assistance or supervision from another person. Score as 3.

   Individual is unable to consistently perform housekeeping tasks unless assisted by another person throughout the process. Score as 4.

   Individual is unable to effectively participate in any housekeeping tasks. Score as 5.

4. **Planning and Preparing Light Meals (e.g. cereal, sandwich) or reheat delivered meals during the last week.**

   Individual is able to independently plan and prepare all light meals for self or reheat delivered meals OR is physically, cognitively and mentally able to prepare light meals on a regular basis but has not routinely performed light meal preparation in the past. May include individuals who routinely eat out for meals, such as the Senior Center or local restaurants. Score as 1.

   Individual needs assistance to plan and prepare light meals on a routine basis due to cognitive, physical or mental limitations. Score as 2.

   Individual is unable to prepare light meals or to reheat delivered meals. Score as 3.

5. **Laundry: Ability to do own laundry, to carry laundry to and from washing machine, to use washer and dryer, to wash small items by hand during the last week.**

   Individual is independently able to manage laundry tasks OR is physically, cognitively and mentally able to laundry and access facilities, but has not routinely performed laundry tasks in the past. Score as 1.

   Individual needs assistance to do laundry, able to do only light laundry such as minor hand wash items or light washer loads. Due to physical, cognitive, or mental limitations needs assistance with heavy laundry such as carrying large loads of laundry. Score as 2.
Unable to do any laundry due to physical limitations or needs continual supervision and assistance due to cognitive or mental limitations. Score as 3.

6. **Transportation**: ability to safely use a car, taxi or public transportation (bus, train, subway) during the last week.

Individual is independently able to drive a regular or adapted vehicle OR individual independently uses public transportation. Score as 1.

Individual needs assistance such as someone else driving the vehicle OR can use public transportation only if accompanied by another person. Score as 2.

Unable to ride in a car, taxi, bus or van and requires transportation by ambulance. Score as 3.

7. **Medications**: Ability to prepare and take medications reliably and safely, including the correct dosage at the correct time during the last week.

Individual may take no prescribed or routine medications. Score as 0.

Individual may be able to independently take the correct medications at the correct times. Score as 1.

Individual is able, with assistance, to take the correct medications at the correct time if: individual dosages are prepared in advance by another person; or if daily reminders are given. Score as 2.

Individual is unable to take medications unless administered by another person. Score as 3.

8. **Ability to handle finances** during the last week.

Individual is able to independently manage financial matters such as budgeting, check writing, paying bills and going to the bank. Is able to collect and keep track of income. Score as 1.

Individual needs assistance with banking matters or major purchases but can manage personal (pocket) money for day-to-day purchases such as groceries or small necessities. Score as 2.

Individual is unable to handle or manage money or financial matters. Score as 3.