

External Standards of Assessment

	BIP ¹	CMSA ²	NASW ³	AMA & AAHCP ⁴	PACE ⁵
Background Information					
Communication	X			X	
Cultural History and Influences		X	X	X	
Education		X	X	X	
Formal Services and Providers		X	X		
Health Insurance		X	X	X	X
Health Literacy		X		X	
Informal Support Systems		X	X	X	X
Language Issues		X			X
Legal Representatives/Documents		X		X	X
Others Living in the Home		X	X		X
Primary Caregiver		X		X	
Primary Health Care Provider		X		X	
Residential Status		X			
Spiritual Support		X	X		
Financial Assessment					
Employment History	X	X	X		
Income/Assets/Other Private Resources			X	X	
Out-of-Pocket Expenses and Impact				X	
Program Eligibility		X		X	
Health					
Abuse or Neglect (potential for or history of)		X			
Allergies/Adverse Drug Events				X	
Assistive Devices or Adaptations		X		X	X
Continence				X	
Dental Status				X	X
Fluid Intake				X	
Gait & Balance Assessment/Falls				X	
Genetic History of Family Health			X		
Hearing				X	
Medical History, Active Diagnoses	X	X	X	X	X
Medications				X	X
Medication adherence				X	
Understanding of medications				X	
Nutritional Status/Weight Change		X		X	X
Pain		X			
Physical Exam				X	
Special Treatments				X	X
Swallowing				X	
Vision				X	
Functional Assessment					
Activities of Daily Living (ADLs)					
Ambulating				X	
Bathing	X			X	X
Bed Mobility	X				
Dressing	X			X	X
Eating	X			X	X

¹ Balancing Incentive Program Implementation Manual, 2011

² Case Management Society of America, Standards of Practice for Case Management, 2010.

³ National Association of Social Workers, Standards for Social Work Practice, 2005

⁴ American Medical Association and American Academy of Home Care Physicians, Medical Management of the Home Care Patient, Guidelines for Physicians, 2007

⁵ Program of All-Inclusive Care for the Elderly Manual, 2011

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Hygiene	X				X
Mobility (in/out of home)	X				X
Oral Care					X
Toilet Use	X			X	X
Transferring	X			X	
Instrumental Activities of Daily Living (IADLs)					
Equipment/Supply Management					X
Managing Finances	X			X	
Managing Medications	X			X	X
Meal Preparation	X			X	X
Ordinary Housekeeping	X			X	X
Shopping	X			X	X
Telephone Use	X			X	X
Transportation	X	X		X	X
Cognitive/Social/Emotional/Behavioral					
Alcohol or Other Substance Use		X	X	X	
Behavioral Symptoms	X	X	X	X	X
Cognitive Functioning	X	X	X	X	X
Judgment/decision-making capacity	X			X	
Memory	X				
Mood and Affect		X	X	X	
Other Psychiatric		X	X		
Readiness to Change		X			
Recent Change in Cognition/Delirium				X	
Sexual Functioning/Body Image			X		
Social Participation/Isolation		X	X	X	X
Suicide Risk		X	X		
Goals and Preferences					
Advance Care Planning		X		X	
Care Goals, Expectations, Preferences				X	X
Health Goals, Expectations, Preferences		X			X
Personal Values or Beliefs			X		
Transitional/Discharge Plan		X			
Environmental Assessment (Home, Community)					
Adequate Space				X	
Communication with Emerg. Svcs. and Utilities				X	
Community Resources				X	
Emergency Preparedness				X	
Housing Accessibility				X	X
Housing Stability				X	
Neighborhood Safety				X	
Safety In-Home				X	
Telephone Access				X	
Transportation Access		X		X	
Caregiver Assessment					
Availability to Provide Care		X		X	
Emotional Competence/Stability		X		X	
History of Abusive Behaviors				X	
Hours/Tasks				X	
Physical Capacity		X		X	
Stress or Need for Respite				X	
Willingness/ Ability to Implement Care Plan				X	
Willingness/Ability to Work with Care Team				X	

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Other					
Family Dynamics		X	X	X	
Learning and Technology Capabilities		X			
Recreational/Leisure Pursuits		X			
Self-Care Capability/Client Strengths		X			X
Stage in Life Cycle & Related Developmental Issues			X		

From Saliba D , Ray LR, Fulbright K, Newcomer R, Wilber K. Memorandum on External Recommendations for Standardized Assessment in the United States. March 2013.