

# METHODS AND OCCASIONS FOR ASSESSMENT

## Suggestions of Types and Times of Assessment for a Person with Cognitive Changes Shelly Weaverdyck

---

### METHODS OF ASSESSMENT

#### 1. Evaluation

- a. Observation of performance on standardized tasks
- b. Scores derived from testing (e.g., Neuropsychological or IQ type tests)
- c. Interviews
- d. Examples: Mental Status Exams, Cognitive tests, Health Professional visits
- e. Considerations:
  - Testing is rarely used in day and residential care settings.
  - Testing procedures are usually unfamiliar and confusing to a person.
  - Tests available are also usually too difficult or anxiety producing.
  - Psychologists, neurologists, and physicians use tests more than do other disciplines.

#### 2. Documentation

- a. Observation of spontaneous performance on tasks in person's own setting
- b. Observation during care or assistance
- c. Examples: walking, setting the table, getting dressed, speech
- d. Considerations:
  - Tasks are normal daily tasks familiar and natural to a person, observed during this person's regular schedule and routine.
  - Observation of the quality (i.e., the nature, type, and level) of performance and help required is a focus.
  - Documentation is used to establish "baseline" or "tracking" data regarding:
    - Cognitive Abilities
    - Task performance
    - Behavior or actions
    - Evidence of emotions (anxiety, anger, pleasure)
    - Participation in activities and events
    - Social interactions

#### 3. Information Gathering and Organizing

- a. Interviews with family, this person with cognitive changes, care partners or caregivers, others
- b. Review of past records
- c. Compilation of information onto a data sheet
- d. Examples: Resident history forms, Rating scales, Application forms
- e. Considerations:
  - This is the most common form of assessment and description

## OCCASIONS FOR ASSESSMENT

### 1. Preadmission/Admission

- a. How long might this person stay at this level of need and skill?
- b. What is this person's history and current status?
- c. What are this person's preferences, habits, and daily routines?
- d. How will this person fit in socially with other participants?
- e. Is this person and our program a good fit?

### 2. Care/Service/Intervention/Support Plan Development

- a. What does this person need from us to meet their own life goals?
- b. Who needs to help this person meet those goals?
- c. How can we operationalize goals into concrete, measurable objectives?
- d. How can we adapt our care and services to this person's schedules and needs, rather than expecting this person to adapt to ours?
- e. How flexibly can we adapt our care/services to the changes this person will go through?
- f. How can we build on this person's cognitive and other abilities, and support or compensate for this person's cognitive and other needs?

### 3. Ongoing Documentation

- a. What is the "baseline" level of cognition, ability, functioning, and behavior for this person?
- b. How can we measure the overt and subtle changes occurring daily?
- c. As this person's abilities and needs change, how should our care/service plan change?
- d. What is the impact of the initiation of an intervention or support strategy?
- e. What is working and what isn't?
- f. What differentiates good from bad days?

### 4. Problem Analysis & Resolution

- a. Why is this distressing situation occurring with this person at this time?
- b. Is this distress, confusion, and behavior consistent with the past?
- c. What needs or desires are evident in this distressing situation?
- d. What is occurring in the environment, in interactions with this person, and within this person at the time of the distressing situation?
- e. Does this distressing situation (including the distress, confusion, and behavior) reflect changes in this person's physical/medical status, the effects of medications, or the task and schedule of events or daily routines?

### 5. Situational Decision Making (When immediate decisions and action are required)

- a. Is everyone safe?
- b. How is everyone feeling?
- c. What is most urgent at this time?
- d. Why is this distressing situation occurring?
- e. What is triggering this in the environment, the interactions with this person, within this person at this time?
- f. How is this person experiencing this event right now?
- g. What are the response options?

See the *Cognitive Abilities and Intervention Strategies (CAIS) Questions to Ask* and the *CAIS Intervention Strategies*, all of these **CAIS Handouts**, and other **resources** at <https://www.improvingmipractices.org>

#### Adapted from Source:

Weaverdyck, S.E. (1997) "Assessment and Care/Service Plans". In National Alzheimer's Association (Ed.) Key Elements of Dementia Care Manual. Chicago, Illinois: Alzheimer's Association.