Overall Tips

- As long as they are safe, residents should be allowed to perform activities as independently as possible.
- Document based on the resident's actual performance; do not record what you think the resident could do.
- Document based how much assistance the resident needs to perform the activity safely.
- An activity can be completed with or without devices. Use of assistive device(s) should not affect documentation of the activity.
- If the resident uses adaptive equipment and performs the activity independently with the use of the device, document as "06, Independent."
- If two or more helpers are required to assist the resident to complete the activity, then document the performance as "01, Dependent."

Eating

This item only includes meals.

One Task (Repeated)

1. How the resident brings food and/or liquid to mouth and swallows once the meal is placed before the resident.

Tips

- Eating task of bringing food/liquid to mouth and swallowing is repeated many times during one meal.
- If resident requires assistance to complete task for more than half of meal, this is considered more than half the effort
- Only consider help once the meal is placed before the resident.
- Opening of cartons or containers is considered setup assistance.
- Includes only the use of suitable utensils (resident may use hands for finger foods)
- Does not include artificial routes (i.e., tube feeding, IV fluids)
- If the resident requires assistance to swallow safely, consider the type and amount of assistance required for feeding and safe swallowing.

For Teeth, Two Tasks

- 1. Use of suitable items to clean teeth
- 2. Rinsing teeth

For Dentures, Two Tasks

- 1. Insert and/or remove dentures (into and from mouth)
- 2. Manage soaking and/or rinsing

Tips

- Setup includes gathering equipment at sink or bedside and applying paste to toothbrush.
- Clean-up includes cleaning up and disposing of waste.
- For a resident who has no natural teeth, consider assistance needed to clean the gums.

Oral Hygiene

For Teeth, Two Tasks

- 1. Use of suitable items to clean teeth
- 2. Rinsing teeth

For Dentures, Two Tasks

- 1. Insert and/or remove dentures (into and from mouth)
- 2. Manage soaking and/or rinsing

- Setup includes gathering equipment at sink or bedside and applying paste to toothbrush.
- Clean-up includes cleaning up and disposing of waste.
- For a resident who has no natural teeth, consider assistance needed to clean the gums.

Toileting Hygiene

Takes place before and after use of the toilet, commode, bedpan, or urinal.

Three Tasks

- 1. Managing undergarments, adjusting clothes, and incontinence products before elimination
- 2. Perineal cleansing
- 3. Managing undergarments, adjusting clothes, and incontinence products after elimination

Ostomy - Tips

- Includes wiping the opening
- Does not include managing equipment

Indwelling Catheter - Tips

- Includes perineal hygiene to the catheter site.
- Does not include managing equipment.

Tips

- If resident does not usually use undergarments, document resident's need for assistance to manage lower body clothing and perineal hygiene.
- If resident has an indwelling urinary catheter and has bowel movements, document Toilet Hygiene based on amount of assistance needed by resident before and after moving bowels.

Three Main Tasks

- 1. The resident's ability to wash the face, upper body, lower body, perineal area, and feet
- 2. The resident's ability to rinse the face, upper body, lower body, perineal area, and feet
- 3. The resident's ability to dry the face, upper body, lower body, perineal area, and feet

Tips

- Do not include washing, rinsing, or drying the resident's back or hair.
- Do not include transferring in or out of the tub or shower.
- Can take place in a shower, bath, or at the sink
- If the resident is able to bathe self after a helper sets up materials, then document as setup or clean-up assistance.

Shower/Bathe Self

Three Main Tasks

- 1. The resident's ability to wash the face, upper body, lower body, perineal area, and feet
- 2. The resident's ability to rinse the face, upper body, lower body, perineal area, and feet
- 3. The resident's ability to dry the face, upper body, lower body, perineal area, and feet

- Do not include washing, rinsing, or drying the resident's back or hair.
- Do not include transferring in or out of the tub or shower.
- Can take place in a shower, bath, or at the sink
- If the resident is able to bathe self after a helper sets up materials, then document as setup or clean-up assistance.

Upper Body Dressing

Two Tasks

- 1. The resident's ability to dress above the waist
- 2. The resident's ability to undress above the waist

Tips

- Helper assistance with buttons and/or fasteners is considered touching assistance.
- Upper body dressing includes bra, undershirt, T-shirt, button-down shirt, pullover shirt, dresses, sweatshirt, sweater, nightgown (not hospital gown), and pajama top.
- Hospital gown is not included in dressing tasks, and upper body dressing cannot be assessed based solely on donning/doffing a hospital gown.
- Includes upper body braces or devices (for example, thoracic-lumbar-sacrum orthosis (TLSO), abdominal binder, back brace, stump sock/shrinker, upper body support device, neck support, hand or arm prosthetic/orthotic)
- If resident dresses self, but helper retrieves or puts away resident's clothing, then document as setup or clean-up assistance.

Lower Body Dressing

Two Tasks

- 1. The resident's ability to dress below the waist
- 2. The resident's ability to undress below the waist

Tips

- Do not include footwear.
- Helper assistance with buttons and/or fasteners is considered touching assistance.
- Lower body dressing includes underwear, incontinence brief, slacks, shorts, capri pants, pajama bottoms, and skirts.
- Includes lower body braces or devices (for example, knee brace, elastic bandage, stump sock/shrinker, lower-limb prosthesis)
- If resident dresses self, but helper retrieves or puts away resident's clothing, then document as setup or clean-up assistance.

Putting On/Taking Off Footwear

Two Tasks

- 1. The resident's ability to put on socks and shoes (or other footwear appropriate for safe mobility)
- 2. The resident's ability to take off socks and shoes (or other footwear appropriate for safe mobility)

- Helper assistance with buttons and/or fasteners is considered touching assistance.
- Footwear includes socks, shoes, boots, and running shoes.
- Includes braces or devices to the feet (for example, ankle-foot orthosis (AFO), elastic bandages, foot orthotics, orthopedic walking boots, compression stockings)
- Compression stockings are considered footwear because they are donned/doffed over the foot
- If helper retrieves or puts away resident's footwear, then document as setup or clean-up assistance.
- For residents with bilateral lower extremity amputations with or without use of prostheses, the activity of putting on/taking off footwear may not occur.
- For example, the socks and shoes may be attached to the prosthesis associated with the upper or lower leg.
- For residents with a single lower extremity amputation with or without use of a prosthesis, the activity of putting on/taking off footwear could apply to the intact limb or both the limb with the prosthesis and the intact limb.

Personal Hygiene

Variable Tasks:

- 1. The resident's ability to maintain personal hygiene, which may include:
- Combing hair
- Shaving
- Applying makeup
- · Washing and drying face and hands

Tip:

• Does not include baths, showers, or oral hygiene.

Roll Left and Right

Three Tasks

- 1. The resident's ability to roll from lying on the back to left side
- 2. The resident's ability to return to lying on the back
- 3. The resident's ability to roll from lying on the back to right side

Tips

- The three tasks can be in any order, but include both the left and right sides and returning to lying on the back.
- The resident may use assistive devices (side rails, trapeze).
- If the resident does not sleep in a bed, document the resident's ability to perform these tasks in alternative sleep furniture.

Sit To Lying

One Task with Two Parts

- 1. The ability to move from sitting on side of the bed to lying flat on the bed includes:
- Part 1: Lowering upper body to bed
- Part 2: Lifting legs into bed

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- Does not include repositioning or "boosting up" in bed
- If the resident does not sleep in a bed, document the resident's ability to perform these tasks in alternative sleep furniture.

Lying to Sitting on the Side of the Bed

One Task with Two Parts

- 1. The ability to move from lying on the back to sitting on side of the bed includes:
- Part 1: Raising upper body from bed
- Part 2: Moving legs over side of bed with no back support

Tins

- Does not include repositioning or "boosting up" in bed.
- If the resident does not sleep in a bed, document the resident's ability to perform these tasks in alternative sleep furniture.

Sit to Stand

One Task

1. Come to a standing position from a sitting position

- Resident could be sitting in chair, wheelchair, or on side of bed.
- If sit-to-stand (stand assist) lift is used and two helpers are needed to assist with the sit-to stand lift, code as "01, Dependent."
- If a full-body mechanical lift is used to assist transferring, document sit to stand as activity did not occur.
- If helper is needed to retrieve assistive device only, document as setup help.

Chair/Bed-To-Chair Transfer

Two Tasks

- 1. Begins with resident sitting in a chair or wheelchair or sitting upright at the edge of the bed (or alternative sleep furniture).
- 2. Includes the ability to return to sitting position in a chair or wheelchair or sitting upright at the edge of the bed (or alternative sleep furniture).

Tips

- May include a stand-pivot, squat-pivot, slide board, standing lift, or mechanical lift
- If mechanical lift is used to assist in a chair/bed-to-chair transfer and two helpers are needed to assist with the mechanical lift transfer, document as "01, Dependent," even if resident assists with any part of the chair/bed-to-chair transfer.

Toilet Transfer

Two Tasks

- 1. Ability to get **on** a toilet or commode
- 2. Ability to get off a toilet or commode

Tips

- Only applies to toilet or commode; does not apply to use of urinal, bed pan, or other elimination devices.
- Do not consider toilet hygiene tasks (clothing management, perineal hygiene).
- If the resident requires a helper to position/set up the beside commode before and/or after the transfer to the commode, but does not require assistance with the toilet transfer, document as setup or clean up help only.

Tub/Shower Transfer

Two Tasks:

- 1. Ability to into the tub or shower
- 2. Ability to get out of the tub or shower

Tips:

• Do not include washing, rinsing, drying, or any other bathing activity with this task.

Car Transfer

Note: Do not attempt this task if it is unsafe.

Two Tasks

- 1. The resident's ability to transfer into the passenger side of a car
- 2. The resident's ability to transfer out of the passenger side of a car

- Never attempt car transfer in staff members' personal vehicles.
- An indoor car simulator may be used (must have similar physical features of a real car).
- Does not include transfer into the driver's seat, opening or closing the car door, or fastening/unfastening the seat belt
- If the resident remains in a wheelchair and does not transfer in and out of the car or van, document as activity not attempted.
- Do not consider assistive devices that are used for walking to and/or from the car, but not used for the transfer in and out of the car.
- If not completed during the observation period code as activity not attempted

Walks 10 Feet

If the resident is unable to walk 10 feet for this item, skip the next two walking items.

One Task

1. Once standing, ability to walk 10 feet in corridor or similar space

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- Do not consider resident's mobility performance when using parallel bars.
- Do not consider support needed to assist resident to standing position.
- The resident may take a brief standing rest break, but if a sitting rest break is required document as activity not attempted.

Walks 50 Feet with Two Turns

Three Tasks

- 1. Once standing, ability to walk at least 50 feet
- 2. Make first 90 degree turn in either direction
- 3. Make second 90 degree turn in either direction

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- Turns can be in the same direction.
- Task can occur as part of activity (i.e., resident walks 10 feet out of room, makes 90 degree turn to the left, walks 45 feet to activity room, makes 90 degree turn to the left).
- Do not consider support needed to assist resident to standing position.
- The resident may take a brief standing rest break, but if a sitting rest break is required document as activity not attempted.

Walks 150 Feet

One Task

1. Ability to ambulate at least 150 feet

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- Do not consider support needed to assist resident to standing position.
- The resident may take a brief standing rest break, but if a sitting rest break is required document as activity not attempted.

Walks 10 Feet on Uneven Surfaces

Note: Do not attempt this task if it is unsafe.

One Task

- 1. The resident's ability to walk 10 feet on uneven or sloping surfaces (indoor or outdoor), such as turf or gravel **Tips**
- Moving from a seated to a standing position is not included in this activity.
- Activity starts once the resident is in a standing position.

1 Step (Curb)

Note: Do not attempt this task if it is unsafe.

Two Tasks

- 1. The resident's ability to go **up** a curb or one step
- 2. The resident's ability to go down a curb or one step

Tip

• Step may be with or without a railing and/or assistive device.

4 Steps

Note: Do not attempt this task if it is unsafe.

Two Tasks

- 1. The resident's ability to go up 4 steps
- 2. The resident's ability to go down 4 steps

Tips

- Steps may be with or without a railing.
- Resident may take a standing or seated rest break between ascending and descending the the 4 steps.

12 Steps

Note: Do not attempt this task if it is unsafe.

Two Tasks

- 1. The resident's ability to go up 12 steps
- 2. The resident's ability to go down 12 steps

Tips

- Steps may be with or without a railing.
- Resident may take a standing or seated rest break between ascending and descending the the 12 steps.

Picking Up Object

Note: Do not attempt this task if it is unsafe.

One Task

1. The resident's ability to bend or stoop from a standing position to pick up a small object, such as a spoon, from the floor

Tip

- If resident requires a helper to retrieve a device, such as a long-handled reacher, to pick up objects from the floor, document as setup assistance.
- Must be from a standing position.
- Assitive devices and adaptive equipment may be used (e.g., cane to support balance, reacher to pick up the object).

Wheel 50 Feet with Two Turns

Three Tasks

- 1. The resident's ability to wheel 50 feet
- 2. The resident's ability to make first 90-degree turn in either direction
- 3. The resident's ability to make second 90-degree turn in either direction

Tips

- The 90-degree turns can be in the same or opposite directions.
- Document the resident's performance once seated in the wheelchair or on the scooter.
- For wheelchair items, if resident is not able to perform the entire distance specified, document the amount and type of help the resident required to determine if more or less half the effort was provided by the helper.

Wheel 150 Feet

One Task

1. The resident's ability to wheel 150 feet in a corridor or similar space

- If the resident can self-propel part of the distance, but not the total distance, and needs assistance from helper to complete distance, determine the amount of assistance provided for entire activity.
- For wheelchair items, if resident is not able to perform the entire distance specified, document the amount and type of help the resident required to determine if more or less half the effort was provided by the helper.

Performance Scale

06 = Independent

• If resident completes activity by him/herself with no assistance from helper

05 = Setup or Clean-Up Assistance

- If helper sets up or cleans up, but resident completes activity
- Helper assists only prior to or following activity, but not during activity.
- **Example** Resident requires assistance cutting up food or opening container(s) or requires setup of hygiene item(s) or assistive device(s).

04 = Supervision or Touching Assistance

- If one helper provides verbal cues and/or touching/steadying/contact guard assistance as resident completes activity
- Assistance may be provided throughout the activity or intermittently
- **Example** Resident requires verbal cueing, coaxing, or general supervision for safety to complete activity; or, resident may require only incidental help, such as contact guard or steadying assist during activity

03 = Partial/Moderate Assistance

- If one helper does LESS THAN HALF the effort
- Helper lifts, holds, or supports trunk or limbs, but provides less than half the effort

02 = Substantial/Maximal Assistance

- If one helper does **MORE THAN HALF** the effort
- Helper lifts or holds trunk or limbs and provides more than half the effort

01 = Dependent

- If helper does ALL of the effort
- Resident does none of the effort to complete activity
- Or, if assistance of two or more helpers is required for resident to complete activity
- Includes when two helpers are required for the safe completion of an activity, even if the second helper provides supervision/stand-by assist only and does not end up needing to provide hands-on assistance.
- Includes when a resident requires the assistance of two helpers to complete an activity (one to provide support to the resident and a second to manage the necessary equipment to allow the activity to be completed.)

Activity Did Not Occur

07 = Resident Refused

If resident refused to complete activity

09 = Not Applicable

• If activity was not attempted and resident did not perform activity prior to the current illness, exacerbation, or injury

10 = Not Attempted Due To Environmental Limitations

- If resident did not attempt activity due to environmental limitations
- Examples Lack of equipment and weather constraints

88 = Not Attempted Due To Medical Condition Or Safety Concerns

• If activity was not attempted due to medical condition or safety concerns

Start Decision Tree Here



Does the patient/resident complete the activity
- with or without assistive devices - by him/
herself and with no assistance (physical, verbal/
nonverbal cueing, setup/clean-up)?



06 - Independent



Does the patient/resident need only setup/clean-up assistance from one helper?



05 - Setup/ Clean-up Assistance



Does the patient/resident need only verbal/nonverbal cueing nor steadying/touching/ contact guard assistance from one helper?



04 - Supervision/ Touching Assistance



Does the patient/resident need physical assistance - for example, lifting or trunk support - from one helper with the helper providing less than half of the effort?



03 - Partial/ Moderate Assistance



Does the patient/resident need physical assistance - for example lifting or trunk support - from one helper with the helper providing more than half of the effort?



02 - Substantial/ Maximal Assistance



Does the helper provide all the effort to complete the activity OR is the assistance of 2 or more helpers required to complete activity?



01 - Dependent