



Patient: Jane Doe

Care Managers: Diane XXXX), RN and Linda XXXX, SW

Assessment Date: January 31, 200X

Background:

Mrs. Jane Doe is a 72 years old female that was referred to Care Partners by her daughter, Sandy Doe. She lives alone in a bedroom apartment at The XXXX Place and does not currently receive any assistance with her care. She was referred to us to assist in an assessment of her current status and to make recommendations in order to maintain her safely in her home.

Mrs. Doe has a number of chronic health problems and is followed by her primary care physician, Dr. Warren XXXX. She is also seen by an orthopaedic physician, Dr. Michael XXXX. Her health problems include spinal stenosis, diabetes, atrial fibrillation, hypertension, urinary incontinence and she is reported to have obsessive compulsive disorder. She is on a number of medications, to include:

1. GlipizideXR 10mg, bid
2. Lexapro 10mg, daily
3. Benicar 20mg, daily
4. Detrol LA 4mg, bid
5. Metformin HCL 500mg, bid
6. Diltiazem CD 180mg, daily
7. Levoxyl 0.2mg, daily

Assessments:

Several standardized tests were administered during the assessment of Mrs. Doe. The following describes the tests performed and scores on those tests.

**Physical Self-Maintenance Scale:**

Scored 12 points out of a possible 30 points. The higher the score, the greater the degree of impairment and dependency on others to provide assistance with activities of daily living. The scale measures toileting, feeding, dressing, grooming, physical ambulation and bathing skills.

**Independent Activities of Daily Living Scale:**

Scored 3 points out of a possible 29 points. The lower the score the greater the degree of impairment and dependency on others to provide assistance with independent activities of daily living. The scale measures ability to use the telephone, shopping, food preparation, housekeeping, laundry, mode of transportation, responsibility for medications and ability to handle finances.

**Short Portable Mental Status Questionnaire:**

Scored 8 points out of a possible 10. The lower the score the greater the degree of cognitive impairment. Cognitive function includes the ability to pay attention or focus on a task, memory, orientation to surroundings, and the ability to calculate.

**Geriatric Depression Rating Scale:**

Scored 6 points out of a possible 15. The higher the score the greater the potential degree of depression. . *A score > 5 points is suggestive of depression and should warrant a follow-up interview. Scores > 10 are most likely indicative of depression and require follow up.*

**Discussion:**

Our assessment suggests that given, Mrs. Doe's current physical and mental status, she should be able to live in her apartment as long as she receives ongoing support with her instrumental activities of daily living (IADL's such as meals and homemaker services) as well as receiving additional support from her daughter. In the near future assistance with activities of daily living (ADL's such as personal care) may become necessary but not at this time. Mrs. Doe appears able to participate in decision making and needs to be instrumental in seeking out services and information.

**Recommendations:**

- Monthly Income - Mrs. Doe is unaware of her current income due to garnishment from unpaid income taxes. She has been encouraged to contact the IRS to discuss this issue as knowledge of her exact income would be beneficial in possibly securing more or different services.
- Chore services - Mrs. Doe currently has the services of a homemaker to handle personal laundry arranged through the Senior Employment Division of Senior Connections. This person is only responsible for washing and drying the clothing. Mrs. Doe was encouraged to discuss the possibility of other chores being performed or discuss the replacement of this person with someone else to assist in other ways.
- Safety - Mrs. Doe would benefit from a transfer bath bench to allow her to safely get into the tub for bathing. Goodwill Equipment has been contacted by the Social Work Care Manager. The agency currently has a bath bench available for her use at no charge. The application and the prescription from Dr. XXXX are included. The bench will need to be picked up from Richmond Goodwill Industries, Inc., 6301 Midlothian Turnpike. The application and prescription are required when you pick up the bench.
- Transportation - Currently Mrs. Doe is dependent on her daughter and neighbors for transportation. Other options include:



1. The Shepherd Center, transportation provided by volunteers for medical appointments and grocery shopping at 355- xxxx,
  2. CareVan through GRTC which provides transportation for appointments, errands and social events. An application is required including a physician's certification. The application is included. Tickets are purchased for use each trip.
  3. The American Red Cross provides transportation for medical appointments. This also requires an application and is a free service. Please contact Sandra 780-xxxx for further information.
- Power of Attorney -Mrs. Doe expressed an interest in designating a decision maker for financial and medical decisions. Information is enclosed on a local elder law attorney.
  - Home Delivered Meals - Mrs. Doe is encouraged to continue with the Senior Connections program for adequate nutrition. The social worker assisting with this program is Ms. XXXX ~ 343-xxxx.
  - Bill Paying Service - A bill paying service is available through the Money Management Department of Senior Connections. You may obtain further information by calling 343- xxxx.
  - Assisted Living Facilities -It would be beneficial to visit assisted living facilities in the area for any future needs. I have included information on St. Frances Home and Chippendale Retirement Center.
  - Medications .Medications were previously covered by Medicaid. Per Henrico County Social Services, Mrs. Doe is no longer eligible for Medicaid. The social Work Care Manager has contacted IVNA for assistance in applying for medication assistance. Information on the IVNA program is enclosed.
  - File of Life -Information is included on the File of Life to place on Mrs. Doe's refrigerator. This provides anyone responding to a medical call with information on current medications and emergency contacts.
  - Diabetic Treatment Center - Mrs. Doe expressed an interest in learning more about meal planning and making better food choices. RN Care Manager spoke with MD office and they are agreeable to making the referral. Patient might benefit from meter instruction, nutrition education and a follow up in 3 months from initial instruction. MD will need to send referral to the Diabetic Treatment Center at 287- xxxx or send per FAX at 287- xxxx (application enclosed)
  - RN recommends that patient set a set time and schedule for toileting – suggesting setting a timer for every 1 ½ hours and expand to every 2 hours. This might encourage better bladder tone. Patient will need to experiment



with a variety of adult protection to find the one that best fits her needs. She may also purchase cloth pads with rubber backing that can easily be washed for her bed and favorite sitting places. These are available through XXXX Pharmacy (288- xxxx) or XXXX Medical (353- xxxx).

- Medication compliance could be enhanced by the use of a weekly medication box. The box system acts as a daily reminder, prevents pills from being spilled or dropped and offers a trigger to remember to call for refills before running out of medication. There are a large number of these boxes available. There are also several pharmacies that “bubble pack” medication. There is an extra cost but it is a valuable service. Pharmacies that offer bubble packing are XXXX Pharmacy (272- xxxx) and XXXX Pharmacy (355- xxxx).

We thank you for choosing Care Partners and encourage you to contact us if you need further clarification or assistance in working with your mother.

Sincerely,

Diane XXXX), RN

Linda XXXX, SW