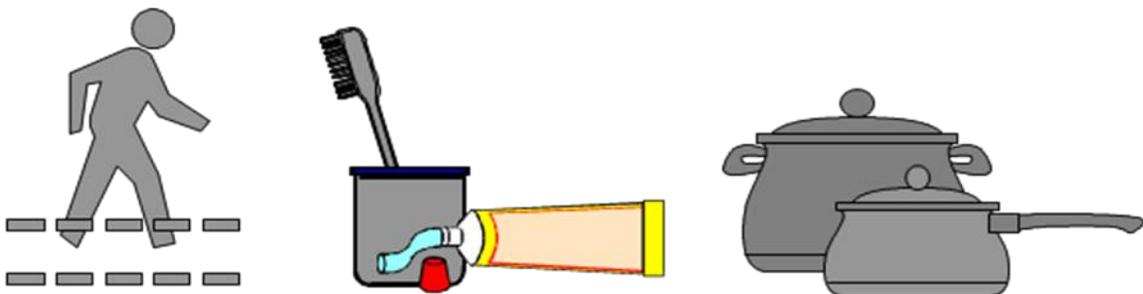# Performance Assessment of Self-Care Skills

## (Rogers & Holm, 2014)
## Version 4.0

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**Created by Mills (2002)**
**Edited by Raina (2004, 2009)**
**Revised, 2014, Raina**

## Performance Assessment of Self-Care Skills (PASS)

## Version 4.0

## TEST MANUAL

**(a)** The PASS consists of 26 tasks: 5 functional mobility (MOB), 3 personal self-care (ADL), 14 instrumental activities of daily living with a cognitive emphasis (C-IADL), and 4 instrumental activities of daily living with a physical emphasis (P-IADL).

**(b)** The PASS is criterion-referenced (person is rated according to established performance criteria); it may be given in total or selected items may be used alone or in combination.

(c) The PASS consists of two versions - clinic and home. The tasks in the clinic and home version are identical, except that the materials used for some of the activities are different. For example, for medication management, the clinic prescription labels on the medications are generated for the PASS; for the Home version clients use their own medications.

**(d)** Several factors may affect the sequencing of the tasks including the set-up of the clinic or home environment (e.g., all items upstairs are completed first), the client's choice, easier items first, and/or the most efficient method for task administration.

**(e)** A general rule of thumb is to begin with the ADL items in the bedroom, such as bed mobility, dressing etc.

**(f)** The examiner may alternate between tasks that are more cognitively based (e.g., money management, medication management, and current events) and tasks that require more physical exertion (e.g., indoor walking, heavy housework, sweeping), which is how the items are currently arranged in the scoring book.

**(g)** The IADL task items included under meal preparation (3 tasks) and clean up after meal preparation (1 task) are typically performed last.

## Scoring system for the PASS – Clinic and Home

**(a)** A 3-ring binder with the PASS forms should be turned horizontally so that the task name, clinic or home conditions, and clinic and home instructions are visible on the top of the open binder and the scoring form is visible on the bottom of the open binder.

**(b)** Items are rated on a predefined 4 point (0-3) ordinal scale. The scoring system is identical for each task and yields three types of scores for each subtask: task <u>independence</u>, task <u>safety</u>, and task <u>adequacy</u>.

**(c)** The scoring sheet format is the same for each task.

**(d)** In the upper left hand corner is the section for <u>assistive technology devices</u> used during the task. Directly below this section are numbered rows for the <u>mobility/ADL/IADL subtasks</u>.

**(e)** Proceeding to the right are 10 hierarchical columns for types of assistance provided by the examiner for each subtask. This is where the <u>independence data</u> are entered.

**(f)** The next column to the right is for entering the <u>safety data</u>. Unsafe observations by the examiner are recorded in this column.

**(g)** The next two columns to the right are for entering the <u>task adequacy data.</u> Inefficiency in the subtask process is checked in the <u>process</u> column, whereas task performance for a subtask that is of unacceptable quality are checked in the <u>quality</u> column.

**(h)** The final column is for the <u>summary</u> scores derived from the task <u>independence</u>, task <u>safety</u>, and task <u>adequacy</u> raw data.

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## Scoring Guidelines for the Independence Data

The following is the hierarchy of types of assistance for the independence data:

Level 1.  **Verbal supportive**- encouragement to initiate, continue, or complete a task (e.g., "you are moving right along", "keep at it", and "great").

Level 2.  **Verbal non-directive**- cues to facilitate task initiation, continuance, or completion without telling the client exactly what to do (e.g., "is there anything missing", "try another way").

Level 3.  **Verbal directive**- verbal statements to initiate, continue, or complete a task (e.g., "check the recipe again," "the date needs to be filled in on the check").

Level 4.  **Gesture-** nonverbal communication including tactile cues to inform the client how to initiate, continue, or complete a task (e.g., pointing at an item, tapping an undone button).

Level 5.  **Task object or environmental rearrangement-** manipulation of task objects or task environment to facilitate task initiation, continuation, or completion (e.g., raising chair height with a cushion, placing a stool under the client's foot when donning shoes, removing task objects that are distracting and then presenting them as needed).

Level 6.  **Demonstration-** modeling with verbal statements if appropriate to illustrate how to initiate, continue, or complete a task (e.g., wiping part of counter and then handing the sponge to the client, and lifting the garbage sack, heading to the door, and then coming back and replacing it for the client to proceed).

Level 7.  **Physical guidance-** movement of the client's body or extremity as needed to facilitate an action to promote task initiation, continuation, or completion, which

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may be accompanied with verbal statements (e.g., positioning hand over a knife or button, guiding a leg out of the tub, and positioning a hand on the bathtub edge).

Level 8.    **Physical support-** physical contact with the client to support the body or an extremity to promote task initiation, continuation, or completion, which may be accompanied with verbal statements (e.g., physical support of an arm when the client is getting out of the bathtub or supporting the weight of the soup pan when soup is poured).

Level 9.    **Total assist-** Examiner does the task for the client by compensating for the client's disability as appropriate for the underlying impairment (e.g., reading the directions on the soup can or muffin box, filling in the date on the check, and balancing the checkbook ledger).  A total assist for one subtask may enable the client to proceed with other subtasks that are not as difficult.

**(a)** Levels 1 through 3 involve only verbal statements.  Levels 4 through 6 require movement or action by the examiner.  Levels 7 and 8 require the examiner to move the self <u>as well as the client</u>.  Level 9 is used when the examiner does all or most of the subtask for the client.

**(b)** When a task cannot be performed independently, the examiner provides the minimal type and amount (frequency and duration) of assistance to facilitate task performance, safety, and adequacy.

**(c)** No more than 3 prompts for a specific level of assistance should be used.  If that many are used, a more powerful prompt is needed.

**(d)** The type and number of prompts are then recorded by the examiner with a check mark or other symbol in the box for each subtask, in order to identify the level of support or

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assistance needed for task performance, and the type and number of assists that enable successful task performance.

**(e)** A maximum of 3 marks or symbols may be placed in an individual subtask box indicating level of assistance provided to the client. This concept is represented in Table 1.

Table 1. Example of scoring subtasks for the Independence data.

| Task#H1: FM: Bed Mobility | No Assistance | Verbal Supportive (Encouragement) | Verbal Non-Directive | Verbal Directive | Gestures | Task or Environment Rearrangement | Demonstration | Physical Guidance | Physical Support | Total Assist | Independence scores for subtasks | Unsafe Observations | PROCESS: Imprecision, lack of economy, missing steps | QUALITY: Standards not met / improvement needed |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Assist level → | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | | | | |
| **Subtasks — MOBILITY/ADL/IADL SUBTASKS** | | | | | | | | | | | | | | |
| 1. Lowers self onto bed in a controlled manner (does not "plop" down) | X | | | | | | | | | | | | | |
| 2. Adjusts body position so mattress completely supports total body (prone, supine, sidelying) | | XX | XX X | | XX X | X | X | | | | | | | |
| 3. Turns self around 180 degrees in a controlled manner (smooth movement, no false starts) | X | | | | | | | | | | | | | |
| 4. Raises self to sitting position on edge of bed in a controlled manner (does not "ratchet" self upright) | X | | | | | | | | | | | | | |
| 5. Raises self off bed in a controlled manner (does not "rock" to gain momentum) | X | | | | | | | | | | | | | |
| 6. Comes to stand & achieves & maintains balance (does not pull self up, does not hold onto bed or other objects) | X | | | | | | | | | | | | | |

Assistive Technology Devices (ATDs) used during task:
1.
2.
3.
Total # of ATDs used:_____

SUMMARY SCORES: INDEPENDENCE MEAN SCORE, SAFETY SCORE, ADEQUACY SCORE

**(f)** A number score is not placed in the grid columns for the independence data.

**(g)** The No Assistance box for each subtask is checked if the client performs the subtask independently.

**(h)** The number of marks or symbols for each level of assistance provided by the examiner comprises the underlined independence data.

**(i)** The examiner may also wish to jot down notes or remarks on the score sheet to assist in a more accurate recall of specifics during task performance.

**(j)** The independence summary scores are derived based on the criteria in Table 2.

Table 2.  Independence rating scale

| SCORE | *INDEPENDENCE* |
|:-----:|---------------|
| **3** | *No assists given for task initiation, continuation, or completion* |
| **2** | *No Level 7-9 assists given,*<br>*But occasional Level 1-6 assists given* |
| **1** | *No Level 9 assists given;*<br>*or*<br>*occasional Level 7 or 8 assists given;*<br>*or*<br>*continuous Level 1-6 assists given* |
| **0** | *Level 9 assists given;*<br>*or*<br>*continuous Level 7 or 8 assists given*<br>*or*<br>*unable to initiate, continue, or complete subtask or task* |

**(k)** The independence summary score is placed in the box below "Independence Scores for Subtasks" (see Table 3)

**(l)** The Independence Summary scores for all Independence subtask are then averaged (mean), yielding an Independence score that ranges between 0 - 3.  This score is then entered in the last column in the box labelled "INDEPENDENCE MEAN SCORE".  For example, for Task #1, Bed Mobility (see Table 3), for the 6 subtasks that are listed, the sum of the Independence Score for Subtasks is 16.  The mean Independence Summary score is 2.67(16/6 = 2.67).

## Table 3:  Independence summary score

| Task#H1: FM:  Bed Mobility | INDEPENDENCE DATA | | | | | | | | | | | SAFETY DATA | ADEQUACY DATA | | SUMMARY SCORES |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Assistive Technology Devices (ATDs) used during task:<br>1.<br>2.<br>3.<br>Total # of ATDs used:_____ | No Assistance | Verbal Supportive (Encouragement) | Verbal Non-Directive | Verbal Directive | Gestures | Task or Environment Rearrangement | Demonstration | Physical Guidance | Physical Support | Total Assist | Independence scores for subtasks | Unsafe Observations | PROCESS: Imprecision, lack of economy, missing steps | QUALITY: Standards not met / improvement needed | |
| Assist level → | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | | | | | |
| **Subtasks**  MOBILITY/ADL/IADL SUBTASKS | | | | | | | | | | | | | | | |
| 1  Lowers self onto bed in a controlled manner (does not "plop" down) | X | | | | | | | | | | 3 | | | | 2.67 |
| 2  Adjusts body position so mattress completely supports total body (prone, supine, sidelying) | | XX | XX X | | XX X | X | X | | | | 1 | | | | |
| 3  Turns self around 180 degrees in a controlled manner (smooth movement, no false starts) | X | | | | | | | | | | 3 | | | | INDEPENDENCE MEAN SCORE |
| 4  Raises self to sitting position on edge of bed in a controlled manner (does not "ratchet" self upright) | X | | | | | | | | | | 3 | | | | |
| 5  Raises self off bed in a controlled manner (does not "rock" to gain momentum) | X | | | | | | | | | | 3 | | | | SAFETY SCORE |
| 6  Comes to stand & achieves & maintains balance (does not pull self up, does not hold onto bed or other objects) | X | | | | | | | | | | 3 | | | | ADEQUACY SCORE |

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## Scoring Guidelines for the Safety Data

**(a)** The examiner enters a checkmark or other symbol across from each subtask, in the grid column for <u>safety</u> data (under Unsafe Observations), if any risks to safety are observed during task performance, or if the examiner is required to intervene because of a risk to client safety (see Table 4).

Table 4. Example of scoring subtasks for the Safety data.

| Task #H1: FM: Bed Mobility | | INDEPENDENCE DATA | | | | | | | | | | | SAFETY DATA | ADEQUACY DATA | | SUMMARY SCORES |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Assistive Technology Devices (ATDs) used during task:<br>1.<br>2.<br>3.<br>Total # of ATDs used:_____ | No Assistance | Verbal Supportive (Encouragement) | Verbal Non-Directive | Verbal Directive | Gestures | Task or Environment Rearrangement | Demonstration | Physical Guidance | Physical Support | Total Assist | Independence scores for subtasks | Unsafe Observations | PROCESS: Imprecision, lack of economy, missing steps | QUALITY: Standards not met / improvement needed | |
| Assist level → | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | | | | | |
| **Subtasks** — MOBILITY/ADL/IADL SUBTASKS | | | | | | | | | | | | | | | |
| 1 — Lowers self onto bed in a <u>controlled</u> manner (does not "plop" down) | X | | | | | | | | | | 3 | | | | 2.67 |
| 2 — Adjusts body position so mattress <u>completely</u> supports total body (prone, supine, sidelying) | | XX | XX X | | XX X | X | X | | | | 1 | X | | | |
| 3 — Turns self around 180 degrees in a <u>controlled</u> manner (smooth movement, no false starts) | X | | | | | | | | | | 3 | | | | |
| 4 — Raises self to <u>sitting position</u> on edge of bed in a <u>controlled</u> manner (does not "ratchet" self upright) | X | | | | | | | | | | 3 | X | | | |
| 5 — <u>Raises self off bed</u> in a <u>controlled</u> manner (does not "rock" to gain momentum) | X | | | | | | | | | | 3 | X | | | |
| 6 — Comes to stand & achieves & maintains balance (does not pull self up, does not hold onto bed or other objects) | X | | | | | | | | | | 3 | | | | |

INDEPENDENCE MEAN SCORE ↑

SAFETY SCORE ↑

ADEQUACY SCORE ↑

**(b)** The number of checkmarks for the <u>safety</u> data will be used to determine the safety <u>summary</u> scores.

**(c)** The examiner may also wish to jot down notes or remarks on the score sheet to assist in a more accurate recall of specifics during task performance.

**(d)** The safety summary scores are derived based on the criteria in Table 5.

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Table 5. Safety rating scale

| SCORE | *SAFETY* |
|---|---|
| **3** | *Safe practices were observed* |
| **2** | *Minor risks were evident but no assistance provided* |
| **1** | *Risks to safety were observed and assistance given to prevent potential harm* |
| **0** | *Risks to safety of such severity were observed that task was stopped or taken over by therapist to prevent harm* |

**(e)** The safety summary score is placed in the box labeled "SAFETY SCORE". The entire task receives one safety summary score (see Table 6).

Table 6: Safety summary score



| Task #H1: FM: Bed Mobility | | INDEPENDENCE DATA | | | | | | | | | | | SAFETY DATA | ADEQUACY DATA | | | SUMMARY SCORES |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Assistive Technology Devices (ATDs) used during task: 1. 2. 3. Total # of ATDs used:_____ | | No Assistance | Verbal Supportive (Encouragement) | Verbal Non-Directive | Verbal Directive | Gestures | Task or Environment Rearrangement | Demonstration | Physical Guidance | Physical Support | Total Assist | Independence scores for subtasks | Unsafe Observations | PROCESS: Imprecision, lack of economy, missing steps | QUALITY: Standards not met / improvement needed | | |
| | Assist level → | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | | | | | | |
| Subtasks | MOBILITY/ADL/IADL SUBTASKS | | | | | | | | | | | | | | | | |
| 1 | Lowers self onto bed in a controlled manner (does not "plop" down) | X | | | | | | | | | | 3 | | | | | 2.67 |
| 2 | Adjusts body position so mattress completely supports total body (prone, supine, sidelying) | | XX | XX X | | XX X | X | X | | | | 1 | X | | | | INDEPENDENCE MEAN SCORE |
| 3 | Turns self around 180 degrees in a controlled manner (smooth movement, no false starts) | X | | | | | | | | | | 3 | | | | | |
| 4 | Raises self to sitting position on edge of bed in a controlled manner (does not "ratchet" self upright) | X | | | | | | | | | | 3 | X | | | | 1.00 |
| 5 | Raises self off bed in a controlled manner (does not "rock" to gain momentum) | X | | | | | | | | | | 3 | X | | | | SAFETY SCORE |
| 6 | Comes to stand & achieves & maintains balance (does not pull self up, does not hold onto bed or other objects) | X | | | | | | | | | | 3 | | | | | ADEQUACY SCORE |

**(f)** Some subtasks have no immediate physical safety risk (e.g., selects the correct cash for the 4 grocery items) and a black box has been placed in the safety data column and/or the safety summary score box (see Table 7).

Table 7:  Subtasks that are not rated for safety

| Task # H8: CIADL: Money Management: Shopping | INDEPENDENCE DATA | | | | | | | | | | Independence scores for subtasks | SAFETY DATA | ADEQUACY DATA | | SUMMARY SCORES |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Assistive Technology Devices (ATDs) used during task: 1. 2. 3. Total # of ATDs used:_____ | No Assistance | Verbal Supportive (Encouragement) | Verbal Non-Directive | Verbal Directive | Gestures | Task or Environment Rearrangement | Demonstration | Physical Guidance | Physical Support | Total Assist | Independence scores for subtasks | Unsafe Observations | PROCESS: Imprecision, lack of economy, missing steps | QUALITY: Standards not met / improvement needed | |
| Assist level → | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | | | | | |
| Subtasks | MOBILITY/ADL/IADL SUBTASKS | | | | | | | | | | | | | | | |
| 1 | Selects all 4 items on the shopping list correctly (requires identification of items, followed by choice of items as indicated by Ct gathering items in one location, pointing to items etc.) | | | | | | | | | | | | | | |
| 2 | Selects the correct cash for the 4 grocery items (cash given matches the receipt amount) | | | | | | | | | | | | | | |
| 3 | Selects the correct coupon for the matching item (sets one coupon aside; gestures to matching item; places coupon on appropriate can) | | | | | | | | | | | | | | |
| 4 | Gives correct coupon & $1.00 to assessor (Brand A Chopped Broccoli coupon) | | | | | | | | | | | | | | |
| 5 | Identifies correctly that change returned is wrong amount (too little) and correctly identifies the amount that should have been returned (34 cents) | | | | | | | | | | | | | | |

INDEPENDENCE MEAN SCORE

SAFETY SCORE

ADEQUACY SCORE

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## Scoring Guidelines for the Adequacy Data

**(a)** The task adequacy data consist of the <u>process</u> of subtask performance and the <u>quality</u> of the subtask performance.

**(b)** Each subtask for the 26 PASS items has a double underlined and a single underlined word or group of words indicating task adequacy performance criteria.

**(c)** The <u>double underlined portion</u> of the subtask is the <u>process</u> criterion for task adequacy. The <u>process</u> criterion describes how the critical expected performance actions of each subtask (e. g., raises self from tub bottom, removes shoes, selects all 4 items, lifts receiver, transports bowl to table, writes the new balance, or locates bathroom), were performed.

**(d)** The <u>single underlined</u> portion of the subtask is the <u>quality</u> criterion of task adequacy. The <u>quality</u> criterion for task adequacy describes the expected quality of the client's actions (e. g., correctly, securely, appropriately, legibly, controlled, maintains balance, or no more than two tries) in performing or carrying out the target process (i.e., the double underlined portion of the subtask).

**(e)** Each time a prompt is provided, the examiner must note if the prompt was given to improve the <u>process</u> or the <u>quality</u> of the task adequacy.

**(f)** The examiner records a checkmark or other symbol in the box for each subtask for each observed <u>process</u> concern (see Table 8).

**(g)** The examiner records a checkmark or other symbol in the box for each subtask for each observed <u>quality</u> concern (see Table 8).

Table 8:  Examples of scoring subtasks for the Adequacy data:

**Task #H1: FM: Bed Mobility**

Assistive Technology Devices (ATDs) used during task:
1.
2.
3.
Total # of ATDs used: _____

| Subtasks | MOBILITY/ADL/IADL SUBTASKS | No Assistance (0) | Verbal Supportive (Encouragement) (1) | Verbal Non-Directive (2) | Verbal Directive (3) | Gestures (4) | Task or Environment Rearrangement (5) | Demonstration (6) | Physical Guidance (7) | Physical Support (8) | Total Assist (9) | Independence scores for subtasks | Unsafe Observations | PROCESS: Imprecision, lack of economy, missing steps | QUALITY: Standards not met / improvement needed |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Lowers self onto bed in a controlled manner (does not "plop" down) | X | | | | | | | | | | 3 | | | |
| 2 | Adjusts body position so mattress completely supports total body (prone, supine, sidelying) | | XX | XX X | | XX X | X | X | | | | 1 | X | XXX | X |
| 3 | Turns self around 180 degrees in a controlled manner (smooth movement, no false starts) | X | | | | | | | | | | 3 | | | |
| 4 | Raises self to sitting position on edge of bed in a controlled manner (does not "ratchet" self upright) | X | | | | | | | | | | 3 | X | | |
| 5 | Raises self off bed in a controlled manner (does not "rock" to gain momentum) | X | | | | | | | | | | 3 | X | | |
| 6 | Comes to stand & achieves & maintains balance (does not pull self up, does not hold onto bed or other objects) | X | | | | | | | | | | 3 | | | |

INDEPENDENCE DATA | SAFETY DATA | ADEQUACY DATA

**SUMMARY SCORES**

INDEPENDENCE MEAN SCORE: 2.67

SAFETY SCORE: 1.00

ADEQUACY SCORE: 

**(h)** The process criterion and the quality criterion for task adequacy are derived based on criteria in Table 9.

Table 9.  Task adequacy scoring scale

| SCORE | TASK ADEQUACY | |
|---|---|---|
| | *PROCESS* | *QUALITY* |
| **3** | *Subtasks performed with precision & economy of effort & action* | *Acceptable, (Standards met)* |
| **2** | *- Subtasks generally performed w/ precision & economy of effort & action; Occasional lack of efficiency, redundant or extraneous actions; no missing steps* | *Acceptable (Standards met, but improvement possible)* |
| **1** | *Subtasks generally performed w/ lack of precision and/or economy of effort & action; consistent extraneous or redundant actions; steps may be missing* | *Marginal (Standards partially met)* |
| **0** | *Subtasks are consistently performed w/ lack of precision and/or economy of effort & action so that task progress is unattainable* | *Unacceptable (Standards not met)* |

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**(i)** The number checkmarks for the task adequacy data will be used to determine the summary score. The adequacy summary score is based on the total task, using the combined task process and task quality data.

**(j)** If task process and quality yield different scores (see Table 9), the lower of the two scores is used so that the client is not put in a situation of risk through overestimation of task adequacy.

**(k)** The adequacy summary score is placed in the box labeled "ADEQUACY SCORE." The entire task receives one adequacy summary score (see Table 10).

Table 10: Adequacy summary score

| Task #H1: FM: Bed Mobility | | | | | | | INDEPENDENCE DATA | | | | | | | SAFETY DATA | ADEQUACY DATA | | SUMMARY SCORES |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Assistive Technology Devices (ATDs) used during task:<br>1.<br>2.<br>3.<br>Total # of ATDs used:_____ | No Assistance | Verbal Supportive (Encouragement) | Verbal Non-Directive | Verbal Directive | Gestures | Task or Environment Rearrangement | Demonstration | Physical Guidance | Physical Support | Total Assist | Independence scores for subtasks | Unsafe Observations | PROCESS: Imprecision, lack of economy, missing steps | QUALITY: Standards not met / improvement needed | |
| Assist level → | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | | | | | |
| Subtasks / MOBILITY/ADL/IADL SUBTASKS | | | | | | | | | | | | | | | |
| 1 Lowers self onto bed in a controlled manner (does not "plop" down) | X | | | | | | | | | | 3 | | | | 2.67 |
| 2 Adjusts body position so mattress completely supports total body (prone, supine, sidelying) | | XX | XX X | | XX X | X | X | | | | 1 | X | XXX | X | |
| 3 Turns self around 180 degrees in a controlled manner (smooth movement, no false starts) | X | | | | | | | | | | 3 | | | | INDEPENDENCE MEAN SCORE |
| 4 Raises self to sitting position on edge of bed in a controlled manner (does not "ratchet" self upright) | X | | | | | | | | | | 3 | X | | | |
| 5 Raises self off bed in a controlled manner (does not "rock" to gain momentum) | X | | | | | | | | | | 3 | X | | | 1.00 |
| 6 Comes to stand & achieves & maintains balance (does not pull self up, does not hold onto bed or other objects) | X | | | | | | | | | | 3 | | | | SAFETY SCORE |
| | | | | | | | | | | | | | | | 1.00 |
| | | | | | | | | | | | | | | | ADEQUACY SCORE |

**(l)** The examiner may also wish to jot down notes or remarks on the score sheet to assist in a more accurate recall of specifics during task performance.

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## Preliminary Checklist prior to the administration of the PASS - Home

**(a)** Did you obtain or replace all perishable and non-perishable PASS- Home items?

**(b)** Did you inform the client that all PASS item materials would be provided throughout the assessment, but that his or her own materials, clothing, or equipment may be used for any task when appropriate?

**(c)** Did you set-up all items in the carrying case according to the sequence of administration for retrieval?

**(d)** Did you check to make sure that the needed scoring forms for the PASS- Home are in the 3-ring notebook?

**(e)** Did you check to make sure that the PASS supplemental notebook with the test materials and help sheets for the following IADL tasks are in place: money management, medication management, current events (visual), and bingo?

**(f)** Did you ask the client upon arrival to his or her home, where the carrying case can best be placed so as to be available, but not in the way?

## Following the administration of the PASS- Home

**(a)** Make sure all necessary information has been gathered from the client.

**(b)** Gather all equipment and items used in the PASS- Home and place these items in the carrying case.

**(c)** All prepared food items should be left for the client, unless otherwise instructed.

**(d)** The examiner must not complete the assessment scoring process at the client's home after completion of all tasks.  However, summary scores should be completed as soon as possible for accuracy of recall.

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# Item Construction Mechanics for PASS Item Development

| 1 | | Identify a task |
|---|---|---|
| 2 | | Identify critical task actions (subcomponents that are necessary for task <u>safety</u> and/or <u>adequacy</u>) in the sequence in which they typically occur during the task |
| 3 | | Begin each subcomponent with an action verb followed by the objects and modifiers. Double underline the <u>critical</u> observable behaviors.  For example <u>Opens second pill bottle</u>.  These become the INDEPENDENCE DATA. |
| 4 | | The <u>PROCESS</u> modifier is the double underlined verb (action) in the subtask.  For example, <u>Lowers</u> self onto the bed in a <u>controlled</u> manner.  In this instance, the precision and efficiency of the action "lowers" is really the "<u>process</u>." |
| 5 | | Identify the <u>QUALITY</u> modifier.  Use a <u>single</u> underline to note it.  For example, <u>correctly</u> or <u>appropriately</u> or <u>legibly</u>.  These modifiers become the referents for the QUALITY DATA. |
| 6 | | If "correct" or "appropriately" are not obvious based on the task, then specific examples are given in parentheses.  For example, for <u>appropriately</u> (good bye, thank you); for <u>correct</u> time (all pills & all slots indicated; days indicated) |
| 7 | | If the immediate physical safety of a client cannot be at risk during the assessment, then under the SAFETY DATA column, place an X.  For example, if the client is verbally reporting the next time the medication is to be taken, there is no immediate risk to safety in that task subcomponent. |
| 8 | | Have several people review the sequence of the task subcomponents, and rate their concurrence with the sequence, whether each subcomponent is "critical" or not for community living and whether the behaviors are observable for level of independence. Also have them rate whether the adequacy modifiers are appropriate, meaning that quality and/or process are applicable and observable. |
| 9 | | Identify the CONDITIONS that must be present.  Include (a) task items that the assessor will provide (b) task items that the client needs to provide (c) set up (table layout, etc.) (d) starting position of client (e) verbal instructions to be given.  When sequential instructions are given, place in brackets what the assessor is to be doing --- for example [select 2 medications to use....], [wait for response], [point to the refrigerator].  When there are several mini-tasks involved (See Task 21, Environmental Awareness), outline each new scenario that requires a change in position for the assessor and the client.  For example:  Pt facing the rolled up scatter rug |
| 10 | | Observe peers or volunteers perform the task and subtasks and attempt to rate them.  If necessary, modify what is "critical" as well as the conditions and directions. |
| 11 | | Reference the PASS, and identify the adaptation source.  For example: Cardell, B (University of Utah) adaptations to the Performance Assessment of Self-Care Skills (PASS-Home) - ©Rogers, JC, & Holm, MB, 2014, all rights reserved |
| 12 | | Please share revised/adapted items with the authors by e-mail<br>    Dr. Margo B. Holm & Dr. Joan C. Rogers<br>    mbholm@pitt.edu<br>    jcr@pitt.edu |

Revised 4-30-14