**DATE:** October 28, 2021

**TOPIC: October 2021 Adult Functional Screen Quiz Rationales**

**Purpose:** The quiz rationales serve to:

* Provide a user friendly tool for agency screen liaisons to help screeners improve their overall knowledge of screen instructions and procedures.
* Encourage discussion among screeners in order to arrive at the correct answers.
* Encourage screeners to think about the reason(s) for their selections and compare those with the rationale provided on the answer version of the quiz.
* Provide answers to all screeners based on real world questions that have come to the team.
* Provide an example of a screener Note for the situation described in the question that would be appropriate given the information provided. \*

The answers to the quiz questions may not be found verbatim in the instructions manual or HRS Supplement; however, the rationales should be assumed to be correct and we would expect the screeners to arrive at those answers as they apply the information in the instructions manual.

As always, do not assume any medical conditions, diagnoses, support needs, or deficits are present for any person described in any question. For instance, do not assume any person described has an intellectual disability unless the information provided tells you that the person has that diagnosis.

In addition, a given diagnoses may have variable signs and symptoms and not everyone will have the same signs and symptoms. Screeners should select the level of assistance needed based on need and not solely a diagnosis. If there are questions on this, please reach out to your liaison or [DHSLTCFSTeam@dhs.wisconsin.gov](mailto:DHSLTCFSTeam@dhs.wisconsin.gov) .

**Objective:** This quiz highlights key areas that were recently updated in the Adult Long Term Care Functional Screen (LTCFS) Instructions including Living Situation and ADLs (Bathing and Mobility in Home). The quiz also includes Diagnoses, ADLs, IADLs, HRS Table, and Risk.

*\* While notes are not required on the Functional Screen, they are useful to explain certain selections, especially in the event that a screen outcome is appealed. The examples included on this document are suggestions only.*

* 1. An ADRC screener makes an initial visit to see Cole.  Cole is 80 years old and currently hospitalized with an exacerbation of his congestive heart failure (CHF).  He maintains his home he owns with his wife in the community and he plans on returning there after his rehabilitation.  When completing Cole’s LTCFS, the screener should select “Other” in Module 3 for Current Residence and enter hospital in the text box.

A. True

1. False

Rationale: The correct answer is B. If individual is currently in a hospital or nursing home for rehabilitation, but he or she maintains a home elsewhere, then the home elsewhere is the individual’s Current Residence.  In this example, Cole is currently hospitalized but maintains his home in the community, so the screener should select With Spouse/Partner/Family under Own Home or Apartment.

Reference: Module 3.5

***Screener Note example:*** *Cole is currently hospitalized but plans to return to his home he maintains with his wife in the community.*

1. Kendrick is a 56 year old who has current verified diagnoses of polyneuropathy and diabetes. He has no cognitive impairment. He needs to use a walker for support in order to keep his balance when walking in his home due to numbness in his feet from his neuropathy. He also has a manual wheelchair from a previous hospitalization but does not use it at this time. During Kendrick’s annual rescreen visit, the screener observes him walking throughout his home while holding his walker for support. He is steady and no safety concerns are observed. He shares that he has no trouble with keeping his balance when he uses his walker. He admits that he does not like to use his walker when his friends come to his home to visit because he is embarrassed that he needs it and will steady himself on walls and countertops instead. What selection should be made for the Mobility in Home ADL on Kendrick’s LTCFS?
2. 0: Person is **independent** in completing the activity safely.
   * Primary Diagnosis: **D13** Other Musculoskeletal, Neuromuscular, or Peripheral Nerve Disorders
   * Secondary Diagnosis: None
   * Uses Walker
   * Uses Wheelchair or Scooter in Home
3. 0: Person is **independent** in completing the activity safely.
   * Uses Walker in Home
4. 1: Help is needed to complete the task safely but **helper DOES NOT have to be physically present throughout the task**.
   * Primary Diagnosis: **D13** Other Musculoskeletal, Neuromuscular, or Peripheral Nerve Disorders
   * Secondary Diagnosis: None
   * Uses Walker in Home
   * Uses Wheelchair or Scooter in Home
5. 1: Help is needed to complete the task safely but **helper DOES NOT have to be physically present throughout the task**.
   * Primary Diagnosis: **D13** Other Musculoskeletal, Neuromuscular, or Peripheral Nerve Disorders
   * Secondary Diagnosis: None
   * Uses Walker in Home

Rationale: The correct answer is B. Check “0” (“Person is independent in completing the activity safely”) when an individual walks independently with adaptive equipment he or she has, needs, and uses, but at times uses walls or furniture in lieu of adaptive equipment. The screener should only select the adaptive equipment the person currently needs, has, and is using in their home. Kendrick needs, has and independently uses his walker for mobility in his home. When his friends are at his home, he uses walls and furniture instead of his walker. He does not need or use his wheelchair at this time.

Reference: Module 5.9

***Screener Note example:*** *Kendrick is able to independently ambulate with his walker in his home.*

1. A screener is completing a screen for an individual with multiple needs and is unsure of what to select for Risk Part B-Box 2. The screener references the instruction manual for guidance and notices that none of the bullets points under the “Check this for a person who” list apply to the individual being screened. Even though none of the bullet points apply, the screener may still consider selecting Risk Part B-Box 2.
2. True
3. False

Rationale: The correct answer is A. The screener may consider the selection of Risk Part B-Box 2. The selection of Risk Part B-Box 2 is appropriate if the person’s health, without any needed assistance from another person, within six to eight weeks, would likely decompensate to the point where they would need to consider entering a nursing home or ICF-IDD to receive care. Risk Part B-Box 2 should not automatically be excluded when an individual does not meet common examples on the “Check this for a person who” list as it is not all-inclusive. The screener should use their professional judgement to consider how the individual would be doing within six to eight weeks if they went without any paid or unpaid assistance from another person.

Reference: 10.3

***Screener Note example:*** *A good note in this area will explain why the screener feels the individual meets Risk Part B-Box 2 above and beyond reiteration of the bullet points.*

1. Harpreet is a 69 years old and lives in her home with her partner. Harpreet has a tracheostomy that was placed as a result of neck cancer. She has a current verified diagnosis of dementia. Although Harpreet’s health conditions are currently stable, she does not have the cognitive ability to manage any components of her tracheostomy care due to memory loss from her dementia. She receives help in her home from her partner and a nurse. A nurse comes to her home to change the outer cannula and change the straps that hold the tubes in place on a weekly basis. Her partner assists with completing site care and cleaning the inner cannula daily. Her partner also completes deep suctioning into her trachea every morning and evening. What selection(s) should be made on the HRS Table of Harpreet’s LTCFS to capture these needs?
2. Tracheostomy Care: 1-2 times/day
3. Tracheostomy Care: 1-2 times/day

Requires Nursing Assessment and Interventions: Weekly

1. Oxygen and/or Respiratory Treatments: 1-2 times/day

Tracheostomy Care: 1-2 times/day

1. Oxygen and/or Respiratory Treatments: 1-2 times/day

Tracheostomy Care: 1-2 times/day

Requires Nursing Assessment and Interventions: Weekly

Rationale: The correct answer is C. Deep suctioning is captured on the Oxygen and/or Respiratory Treatment row. Changing the outer cannula, inner cannula, changing the straps and site care are all captured in the Tracheostomy Care row. When more than one “Frequency of Help/Services Needed from Other Persons” (column) applies to one HRS task (row), select the frequency of the task completed most often. The Requires Nursing Assessments and Interventions row would not be selected in this scenario as the four criteria have not been met. Harpreet’s health is currently stable and her needs can be captured on other rows of the HRS Table.

Reference: Module 7.3, Module 7.4, Module 7.18, Module 7.22, Module 7.29

***Screener Note example:***

*Oxygen and/or Respiratory Treatments: Harpreet needs assistance with deep suctioning her trachea as she does not have the cognitive ability to do so due to dementia.*

*Tracheostomy Care:**Harpreet needs assistance with completing all components of her tracheostomy care as she does not have the cognitive ability to do so due to dementia.*

1. Jerry is a 35 year old with bilateral above the knee amputations who recently obtained prostheses. Since obtaining prostheses, he has started driving a regular vehicle. When asked, Jerry reported that he cannot feel the pressure that he is placing on the pedals of his vehicles and that his shoes frequently become caught underneath the pedals when shifting between them. He shares that he has had a close call where he nearly crashed into a parked vehicle when his shoe became trapped underneath his gas pedal. However, Jerry feels that it is safe to drive as he has a valid driver’s license and has had no accidents or citations. The screener should select 1a: Person drives regular vehicle for the Transportation IADL on Jerry’s LTCFS.
2. True
3. False

Rationale: The correct answer is B. The screener will rely on professional judgment when identifying whether or not there are serious safely concerns evident when a person with a physical, psychiatric, or cognitive impairment drives a motor vehicle. Although Jerry does not feel that there are safety concerns with his driving, his physical impairment is causing safety concerns when he operates the pedals of his vehicle.

Reference: Module 5.18

***Screener Note example:*** *Transportation: Jerry drives a regular vehicle. There are serious safety concerns when he operates the pedals of his vehicle; he cannot feel the pedals and the shoes he wears with his prostheses routinely become caught underneath them.*

1. Hector was recently transferred from supportive care into home hospice care. He tells his screener that he is only looking for end of life support at this time after being told by his doctor that he is terminally ill and has approximately 6 months to live. The screener obtains medical records from Hector’s doctor and determines that he was admitted to hospice due to complications from his congestive heart failure. His medical records also note a history of prostate cancer 10 years ago. The records do not list a diagnosis of terminal illness. What diagnoses should be selected on the Diagnosis Table?
2. **C4:**  Congestive Heart Failure (CHF)

**J2:** Cancer in Past 5 Years

**K3:**  Terminal Illness (prognosis < or = 12 months)

1. **C4:** Congestive Heart Failure (CHF)
2. **C4:**  Congestive Heart Failure (CHF)

**K3:**  Terminal Illness (prognosis < or = 12 months)

1. **C4:** Congestive Heart Failure (CHF)

**J2:**  Cancer in Past 5 Years

Rationale: The correct answer is C. The screener should use the Diagnosis Table and Diagnosis Cue Sheet when determining how to code diagnoses on the LTCFS. Although Hector’s terminal illness diagnosis is not listed on his medical records, the screener may code this as it has been reported in clear, medical terms. For the purposes of the LTCFS, terminal condition is defined as a condition with which a person’s death is expected within one year from the date of the person’s screening. The screener must select both “K3: Terminal Illness (prognosis less than or equal to 12 months)” on the LTCFS Diagnosis Table **and**the associated diagnosis that has created the terminal condition (in this scenario, congestive heart failure). Written documentation from the physician of the person being screened that verifies the terminal nature of the condition is not required. The screener should not code cancer as it has not been within the past 5 years. Cancer can be included in the Notes section.

Reference: Module 2.8, Module 4.2, Diagnoses Cue Sheet

***Screener Note example:***

*Diagnoses:*

*C4: CHF- confirmed by MD*

*K3: Terminal Illness- clearly stated*

*Prostate cancer 10 years ago*

1. Alara relies on a walker to independently ambulate in her home as she has an unstable gait as a result of sciatica. She lives in an old house with narrow doorways. Her walker does not fit into her bathroom. When she enters her bathroom, she leaves her walker outside of the bathroom door and instead holds onto nearby walls and a bathroom sink in order to keep her balance. She has had no falls and the screener observed no safety concerns when she is doing so. What selection should be made for the Mobility in Home ADL on Alara’s LTCFS?
2. 0: Person is **independent** in completing the activity safely.

1. 0: Person is **independent** in completing the activity safely.
   * Uses Walker

C. 1: Help is needed to complete the task safely but **helper DOES NOT have to be physically**

**present throughout the task**.

* Primary Diagnosis: **D12** Other Chronic Pain or Fatigue
* Secondary Diagnosis: None

D. 1: Help is needed to complete the task safely but **helper DOES NOT have to be physically present throughout the task**.

* Primary Diagnosis: **D12** Other Chronic Pain or Fatigue
* Secondary Diagnosis: None
* Uses Walker

Rationale: The correct answer is B. When an individual walks independently with adaptive equipment he or she has, needs, and uses, but at times uses walls or furniture in lieu of adaptive equipment, Independent and the appropriate adaptive equipment should be selected. The screener should only select the adaptive equipment the person currently needs, has, and is using in their home. Alara needs, has, and independently uses her walker for mobility in her home. She uses walls and furniture in lieu of her walker in spaces in her home where it does not fit.

Reference: Module 5.9

***Screener Note example:*** *Mobility: Alara independently uses a walker in her home due to her unstable gait from sciatica.*

1. Michael has a permanent cognitive impairment and ataxia as a result of a traumatic brain injury that occurred when he was 39. These diagnoses are current and have been verified through medical records provided by his doctor. His caregiver shares that Michael forgets that he needs to use a cane and needs to be cued several times per day to initiate using it so he does not forget. His caregiver shares that Michael will lean on nearby furniture when walking without his cane. This has resulted in two falls in the past month. What selection should be made for the Mobility in Home ADL on Michael’s LTCFS?
2. 0: Person is **independent** in completing the activity safely.
   * Uses Cane
3. 1: Help is needed to complete the task safely but **helper DOES NOT have to be physically present throughout the task**.

* Primary Diagnosis: **A3** Brain Injury with onset BEFORE age 22
* Secondary Diagnosis: None
* Uses Cane

1. 1: Help is needed to complete the task safely but **helper DOES NOT have to be physically present throughout the task**.

* Primary Diagnosis: **E4** Traumatic Brain Injury AFTER age 22
* Secondary Diagnosis: None
* Uses Cane

Rationale: The correct answer is C. When a person walks independently but requires a cue to use adaptive equipment, 1: Help is needed to complete the task safely but helper DOES NOT have to be physically present throughout the task, should be selected. Although Michael walks independently, he needs a cue to use his cane due to his cognitive impairment. The screener should only select the adaptive equipment the person currently needs, has, and is using in their home. Michael needs, has and uses his cane for mobility in his home. Michael’s traumatic brain injury should be coded as E4 as it occurred after the age of 22.

Reference: Module 5.9, Diagnosis Cue Sheet

***Screener Note example:*** *Mobility:**Michael needs to be reminded to use his cane when walking in his home as he does not remember to do so due to cognitive impairments from his traumatic brain injury.*

1. Pam has a confirmed diagnosis of a rotator cuff tear which is limiting her ability to reach her back as well as she would like to when showering. She purchased a hand held shower and long handled sponge which she uses to allow her to wash and rinse her back. She needs her husband to assist her with drying her back because it is too difficult to reach. She has no difficulties with washing or drying her hair or other parts of her body. She has grab bars next to her tub but does not need to use them at this time. She is observed safely stepping in/out of her bathtub and turning the faucets on/off. What selection should be made for the Bathing ADL on Pam’s LTCFS?
2. 0: Person is **independent** in completing the activity safely.
3. 0: Person is **independent** in completing the activity safely.
   * Uses Grab Bar(s)
4. 1: Help is needed to complete the task safely but **helper DOES NOT have to be physically present throughout the task**.

* Primary Diagnosis: **D4** Other Fracture/Joint Disorders/Scoliosis/Kyphosis
* Secondary Diagnosis: None

1. 1: Help is needed to complete the task safely but **helper DOES NOT have to be physically present throughout the task**.

* Primary Diagnosis: **D4** Other Fracture/Joint Disorders/Scoliosis/Kyphosis
* Secondary Diagnosis: None
* Uses Grab Bar(s)

Rationale: The correct answer is A. When a person bathes independently but is unable to wash and/or dry his or her back, the screener should check “0”: Person is independent in completing the activity safely. The screener should only select the adaptive equipment the person currently needs, has, and is using in their home. Pam is independent with all of the components of Bathing. Pam only needs assistance to dry her back and this is an exception to the components of Bathing. Although Pam has a grab bar, she does not need to use it.

Reference: Module 5.6

***Screener Note example:*** *Pam is independent with all components of bathing. Pam has a grab bar next to her tub but does not need to use it.*

1. Louise has confirmed diagnoses of osteoporosis and multiple sclerosis. She is prescribed Risedronate to maintain her bone strength. She takes this medication 1x/day and has no other prescription medications. In order for the medication to work effectively, the pill must be taken with a full glass of water on an empty stomach at least one hour before her breakfast. She has no cognitive impairments. She can open her easy open pill bottle, place her pill in her mouth and swallow her medication independently. She needs her caregiver to bring her a glass of water to take with her medication as she does not have the strength to carry it due to weakness in her hands from multiple sclerosis. What selections should be made for the Medication Administration and Medication Management rows on the HRS Table on Louise’s LTCFS?
2. Medication Administration: Person is Independent

Medication Management: Person is Independent

1. Medication Administration: Person is Independent

Medication Management: 1-2 times/day

* Primary Diagnosis: **D7** Multiple Sclerosis/ALS
* Secondary Diagnosis: None

1. Medication Administration: 1-2 times/day

* Primary Diagnosis: **D7** Multiple Sclerosis/ALS
* Secondary Diagnosis: None

Medication Management: Independent

1. Medication Administration: 1-2 times/day

* Primary Diagnosis: **D7** Multiple Sclerosis/ALS
* Secondary Diagnosis: **D5** Osteoporosis/Other Bone Disease

Medication Management: 1-2 times/day

* Primary Diagnosis: **D7** Multiple Sclerosis/ALS
* Secondary Diagnosis: None

Rationale: The correct answer is C. When an individual needs assistance with getting food or drink, outside of meal preparation, needed to take their medication, the help needed should be captured in the Medication Administration row on the HRS Table at a frequency of 1-2 times/day. Louise only needs assistance with obtaining water to take her medication outside of her meal times due to the weakness in her hands from multiple sclerosis. She is able to manage her medications independently.

Reference: Module 7.10, Module 7.14

***Screener Note example:***

*HRS Medication Administration:**Louise needs help with retrieving a glass of water in order to take her medications due to weakness in her hands from multiple sclerosis.*

*HRS Medication Management: Louise is independent with medication management.*