

Support Needs Assessment Tool Selection Work Group

Idaho Department of Health and Welfare

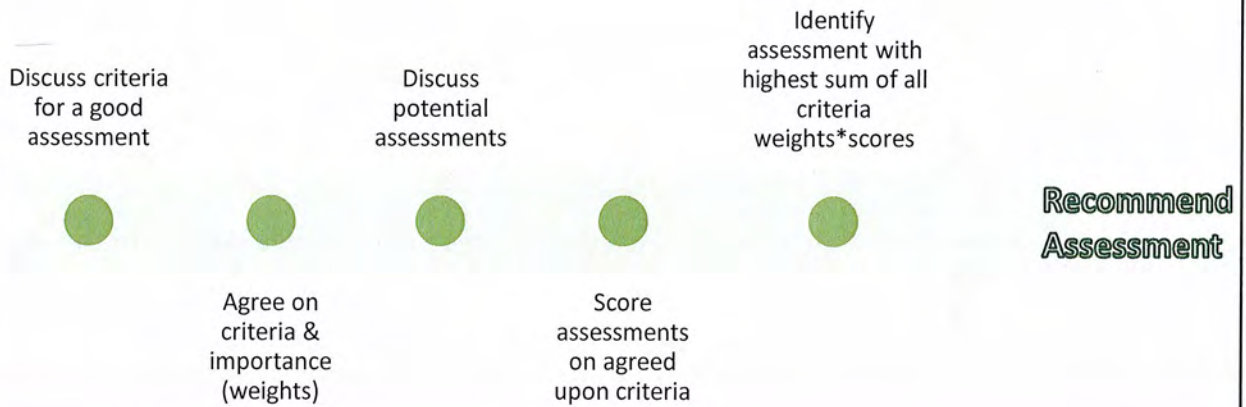
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Today's process



Agenda

8:00 – 9:00	What makes a good support needs assessment?
9:00 – 10:30	What is important for a support needs assessment in Idaho?
10:45 – 12:00	Review of support needs assessments
12:00 – 1:00	Lunch
1:00 – 2:00	Score assessments in criteria
2:15 – 4:00	Team score comparison and discussion
4:00 – 4:30	Select and discuss assessment
4:30 – 5:00	Feedback and Next Steps

Note: Please take breaks throughout the day as needed.

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Why This Work Is Important

According to DHW's Developmental Disabilities Program website:

"The goal of the Adult Developmental Disabilities Care Management Program is to assist adults with developmental disabilities in getting the right care at the right place at the right cost with the right outcomes."

DHW is about to embark on a new method of allocating resources to achieve this aim. This new process of assigning *personal support budgets* requires the selection of an accurate and consistent assessment tool to identify individual support needs.

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Support Budgets Basics

A **supports budget** is a targeted allocation (or amount of money) that is made known to individual service recipients *before service planning* and is used to help them get the services they need and prefer.

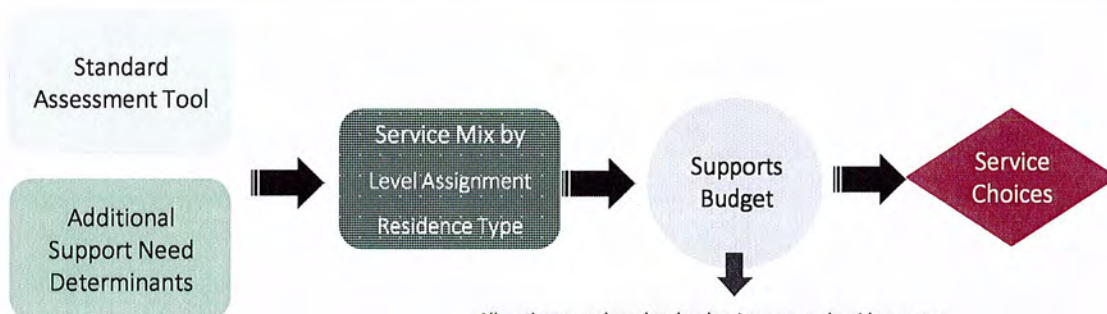
- The amount is determined by assessing an individual's support needs, while accounting for where they live (e.g., certified family home, supported living), and their age (e.g., adult or youth).
- An exceptions review process is also used to assure that extraordinary needs are appropriately addressed.

Benefits

- ✓ Gives people more control and knowledge regarding the services they receive.
- ✓ Gives the state the ability to change service array and rates to match their policy intentions.
- ✓ Increases fairness among all service recipients.
- ✓ Enables the state to better predict overall system spending.

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Deriving a personal supports budgets



Allocations vary based on level assignment and residence type.

Each level represents an amount of money for base services.

Additional services may be added-on if additional support needs are necessary.

Processes are implemented to address exceptional needs.

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First step:

Discuss criteria for a good assessment

Discuss potential assessments

Identify assessment with highest sum of all criteria weights* scores

Recommend Assessment



Agree on criteria & importance (weights)

Score assessments on agreed upon criteria

What makes a good support needs assessment?

A good assessment:

- Measures what we want it to measure – Support Need
- Measures it accurately and consistently
- Is easy to use, maintain, and defend
- Meets Idaho’s immediate needs

Specific criteria developed by HSRI presented next

See ‘Assessment Tool Selection Criteria Definitions’ to follow along and take notes



To consider:

Should anything else be added to the criteria?

How important are each of these criteria to Idaho?

What makes a good assessment?



Instrument Properties

- Background information & content areas
- Medical & behavioral support needs
- Psychometric properties & standardization
- Ease of use
- Instrument is respectful of service recipients



Instrument Utilization

- Assessment tool uses
- Technological infrastructure
- Services available
- Process is respectful of service recipients



Idaho-Specific Criteria

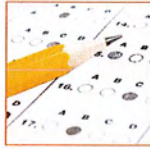
- Limited statutory changes
- 2-year timeframe
- No difficult transition period
- Feasible for annual assessment

Background information & content areas



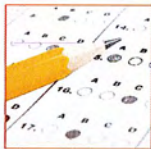
- Background information
- Activities of daily living
- Instrumental activities of daily living
- Cognition/Memory
- Medical conditions/diagnoses
- Challenging behavior

Medical & behavioral support needs



- Assesses medical support needs
- Assesses behavioral support needs

Psychometric properties & standardization



- Documented validity
- Documented reliability
- Standardized/normed

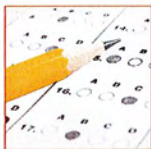
Ease of use



- Logical and understandable
- Consistent response options

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Instrument is respectful of service recipients



- Strengths-based and focused on support need
- Respectful of diversity and culture
- Person-centered

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Assessment tool uses



- Can be used for eligibility
- Is used somewhere for eligibility
- Can be used for budget allocation
- Is used somewhere for budget allocation
- Can be used for person-centered planning

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Technological infrastructure



- Acceptable electronic database vendor identified
- Aggregation of scores useful for measuring support need
- Database platform readily available
- Automated and transparent scoring
- Ability to create reports

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Services available



- Ongoing testing and research
- Support and training
- Certification and/or training of assessors

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Process of respectful of service recipients



- Respectful of diversity and culture
- Service recipient leads responses
- Not burdensome
- Transparent scoring and level process

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Idaho-Specific Criteria



- Limited need for statutory changes
- Can be implemented within 2-year timeframe
- Will not require a difficult transition period
- Feasible for annual assessment

Next step:



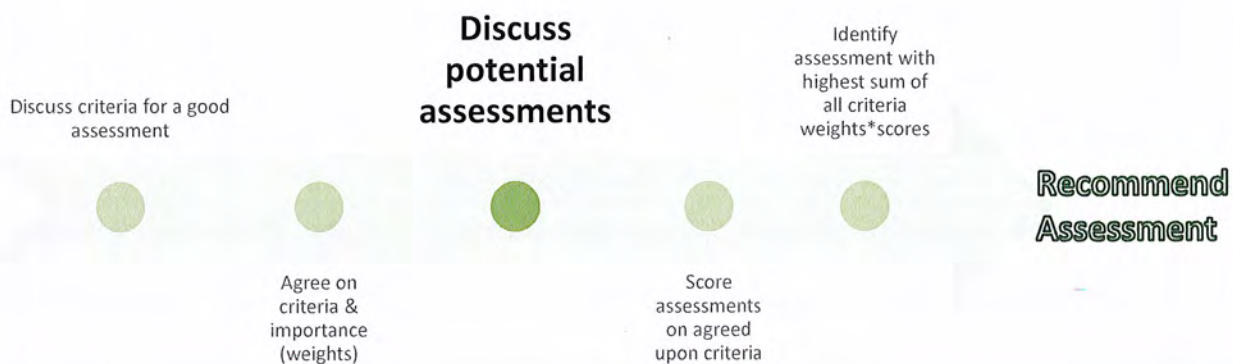
Weighting criteria

- 
- 0 = Not important at all and should not impact tool selection
 - 1 = Minimally important and should have a small impact on selection
 - 2 = Somewhat important
 - 3 = Moderately important and should moderately impact selection
 - 4 = Very important
 - 5 = Extremely important and should have a large impact on selection
 - 10 = Deal maker (use sparingly/carefully)

[Let's take a look at the criteria again!](#)

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Next step:



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Support Needs Assessments

HSRI reviewed all available tools for assessing support needs

DHW and other stakeholders in Idaho convened to discuss potential assessments and considerations for the assessment

Three assessments are still under consideration:

- Supports Intensity Scale (SIS)
- Inventory for Client and Agency Planning (ICAP)
- interRAI



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Supports Intensity Scale



Created by American Association on Intellectual and Developmental Disabilities (AAIDD) in 2004

Used in a number of states and translated into at least 12 languages

Most recent version specific to adults – SIS-A

89 items designed to measure types of supports across life domains

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SIS: Background information & content areas



Section 1: Exceptional Medical and Behavioral Needs

Section 2: Support Needs Index

- A: Home Living Activities
- B: Community Living Activities
- C: Lifelong Learning Activities
- D: Employment Activities
- E: Health and Safety Activities
- F: Social Activities



Section 2E: Health and Safety Activities

	TYPE OF SUPPORT				
	0	1	2	3	4
1. Taking medications	0	1	2	3	4
2. Ambulating and moving about	0	1	2	3	4
3. Avoiding health and safety hazards	0	1	2	3	4
4. Obtaining health care services	0	1	2	3	4
5. Learning how to access emergency services	0	1	2	3	4
6. Maintaining a nutritious diet	0	1	2	3	4
7. Maintaining physical health and fitness	0	1	2	3	4
8. Maintaining emotional well-being	0	1	2	3	4

Section 3: Supplemental Protection and Advocacy Scale

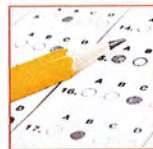
SIS: Medical and behavioral support needs



Section 1 documents conditions and diagnoses

Does not measure support need type, frequency, or duration

Other jurisdictions that use SIS supplement with medical/behavioral needs measures



Exceptional Medical Support Needs	NO SUPPORT NEEDED	SOME SUPPORT NEEDED	EXTENSIVE SUPPORT NEEDED
RESPIRATORY CARE			
1. Inhalation or oxygen therapy	0	1	2
2. Postural drainage	0	1	2
3. Chest PT	0	1	2
4. Suctioning	0	1	2
FEEDING ASSISTANCE			
5. Oral stimulation or jaw positioning	0	1	2

SIS: Psychometric properties and standardization



Extensive literature on validity and reliability
Normed and standardized



Exploring Shared Measurement Properties and Score Comparability Between Two Versions of the *Supports Intensity Scale*

Hyojeong Seo, PhD
Karrie A. Shogren, PhD

Impact of the Protection and Advocacy Subscale on the Factorial Validity of the Supports Intensity Scale—Adult Version

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Abstract

The Supports Intensity Scale—Adult version (SIS-A) is a standardized measure of support needs. The current study examined the factorial validity of the standardized SIS-A Protection and Advocacy Scale of support needs, with those of trans support needs, but in fewer instar

Evaluating the supports intensity scale as a potential assessment instrument for resource allocation for persons with intellectual disability

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Keywords: support need assessment

SIS: Ease of use



Straight-forward items and responses



Three required response options for each item:

RATING KEY

TYPE OF SUPPORT	FREQUENCY	DAILY SUPPORT TIME
What kind of support should be provided?	How frequently is support needed for this activity?	On a typical day when support in this area is needed, how much time should be devoted?
0 = none	0 = none or less than monthly	0 = none
1 = monitoring	1 = at least once a month, but not once a week	1 = less than 30 minutes
2 = verbal/gestural prompting	2 = at least once a week, but not once a day	2 = 30 minutes to less than 2 hours
3 = partial physical assistance	3 = at least once a day, but not once an hour	3 = 2 hours to less than 4 hours
4 = full physical assistance	4 = hourly or more frequently	4 = 4 hours or more

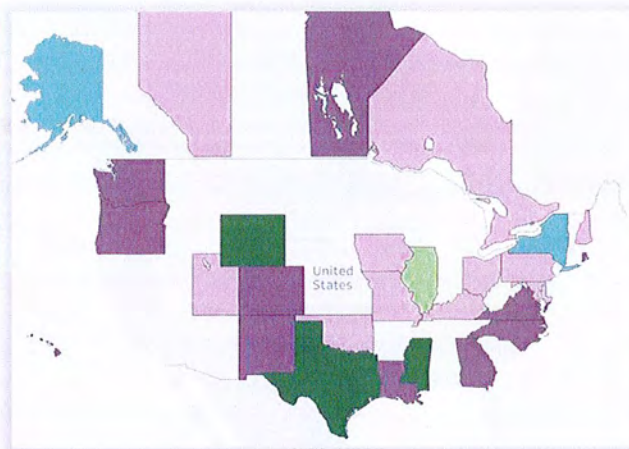
SIS: Instrument is respectful of service recipients



Items on language, communication mode, race/ethnicity, education
Measures support needs



SIS: Assessment tool uses



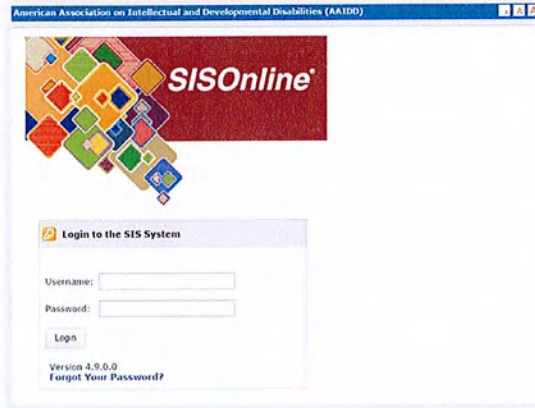
Assessment

- SIS (support budgets)
- SIS
- ICAP (support budgets)
- ICAP
- interRAI (considering)

SIS: Technological infrastructure



SISOnline system by AJ Boggs



SIS: Services available



Support via AJ Boggs

AAIDD offers training and certification



Supports Intensity Scale Training Agenda
Suggested time is noted below—although individual classes may vary somewhat

9:00 Welcome and Introductions

- Icebreaker To Introduce Everyone
- Goals Of Class/Quick Overview of Day

10:00 Module 1: Introduction and Rationale for the SIS

- How SIS Differs From Other Assessments
- Influences on Supports
- Multiple Uses for SIS

10:50 Morning Break (10-15 Minutes)

11:00 Module 2: Administering and Scoring the SIS

- Overview of Major Components
- Frequently Asked Questions
- The Ratios: Frequency Time Type

SIS: Process is respectful of service recipients



- Interview with service recipients
- Approximately 2 hours for assessment
- Responses scored at interview



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SIS: Idaho-specific criteria



- Statutory changes necessary for eligibility criteria
- Timeframe may be hindered by necessary training, but helped with existing technological and training infrastructure and developed level framework



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Inventory for Client and Agency Planning



Developed in 1986

Adapted from SIB-R – contains all the same dimensions

Designed to measure adaptive and maladaptive behavior in all ages

101 items

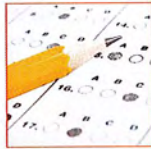
Produced an ICAP Service Scores (9 levels)

ICAP: Background information & content areas



Adaptive behaviors

- Motor skills
- Social and communication skills
- Personal living skills
- Community living skills



Maladaptive behaviors

- Self-injury/stereotyped/withdrawn
- Offensive/uncooperative
- Disruptive/destructive/hurts others

2. SOCIAL AND COMMUNICATION SKILLS

Does (or could do) test completely without help or supervision:

0. NEVER OR RARELY—even if asked				1. DOES, BUT NOT WELL—or ¼ of the time—may need to be asked				2. DOES FAIRLY WELL—or ½ of the time—may need to be asked				3. DOES VERY WELL—always or almost always—without being asked			
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ICAP: Ease of use



Logically ordered

Scoring less transparent

Response options from 0 to 3:



Does (or could do) task completely without help or supervision:

0. NEVER OR RARELY—even if asked

1. DOES, BUT NOT WELL—or ¼ of the time—
may need to be asked

2. DOES FAIRLY WELL—or ¾ of the time—
may need to be asked

3. DOES VERY WELL—
always or almost always—without being asked

0

1

2

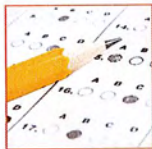
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41

ICAP: Instrument is respectful of service recipients



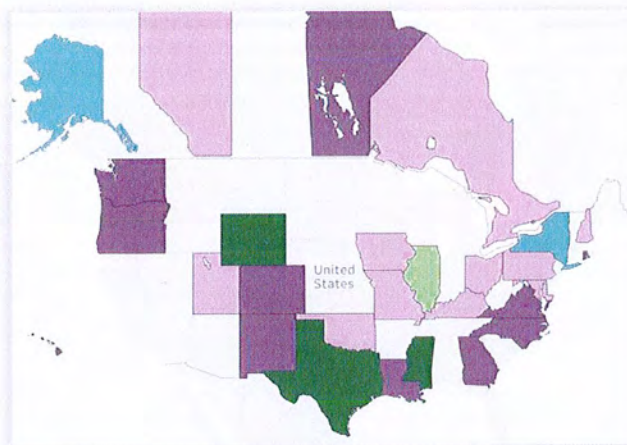
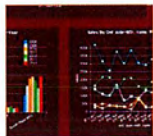
Deficit-based, measures adaptive and maladaptive functioning rather than support



16. Folds a letter into three equal sections and seals it in an envelope.
17. Threads a sewing needle.
18. Assembles objects that have at least ten small parts that must be screwed or bolted together (for example, unassembled toys or furniture).

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ICAP: Assessment tool uses



Assessment

- SIS (support budgets)
- SIS
- ICAP (support budgets)
- ICAP
- interRAI (considering)

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ICAP: Technological infrastructure



States have implemented their own technology or outsourced

Past vendors for technology have included Ascend



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ICAP: Services available



No technology, training, or ongoing support vendor associated with ICAP
(though some vendors like Ascend have experience with technology)



ICAP: Process is respectful of service recipients



Service recipient not necessarily present for interview
Scoring done after interview by assessor
(unclear if other interview and scoring techniques are acceptable)



ICAP: Idaho-specific criteria



Eligibility will be similar to current domains

Timeframe will be quicker, transition potentially smoother due to similarity to current assessment (SIB-R)



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interRAI



interRAI

Suite of compatible assessment tools, including IDD (2010)

Developed to assess support needs of individuals with IDD

Assessments in the suite besides IDD implemented widely, such as home care and assisted living

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interRAI: Background information & content areas



Background information

ADLs

IADLs



Cognition/Memory

Medical conditions/diagnoses

Challenging behavior

SECTION J. FUNCTIONAL STATUS

1. IADL SELF-PERFORMANCE AND CAPACITY

Code for **PERFORMANCE** in routine activities around the home or in the community during the **LAST 3 DAYS**

Code for **CAPACITY** based on presumed ability to carry out activity as independently as possible. This will require 'speculation' by the assessor.

- 0. **Independent**—No help, set-up, or supervision
- 1. **Set-up help only**
- 2. **Supervision**—Oversight/cueing
- 3. **Limited assistance**—Help on some occasions
- 4. **Extensive assistance**—Help throughout task, but performs 50% or more of task on own
- 5. **Maximal assistance**—Help throughout task, but performs less than 50% of task on own
- 6. **Total dependence**—Full performance by others during entire period
- 8. **Activity did not occur**—During entire period (DO NOT USE THIS CODE IN SCORING CAPACITY)

	P - Performance	C - Capacity	P	C
a. Meal preparation —How meals are prepared (e.g., planning meals, assembling ingredients, cooking, setting out food and utensils)			<input type="checkbox"/>	<input type="checkbox"/>
b. Ordinary housework —How ordinary work around the house is performed (e.g., doing dishes, dusting, making bed, tidying up, laundry)			<input type="checkbox"/>	<input type="checkbox"/>
c. Managing finances —How bills are paid, checkbook is balanced, household expenses are budgeted, credit			<input type="checkbox"/>	<input type="checkbox"/>

interRAI: Medical and behavioral support needs



Assesses presence of conditions

Lacks questions about supports needed



SECTION I. HEALTH CONDITIONS

1. SELF-REPORTED HEALTH

Ask: "In general, how would you rate your health?"

- 0. Excellent
- 1. Good
- 2. Fair
- 3. Poor
- 6. Could not (would not) respond

2. PROBLEM FREQUENCY

Code for presence in last 3 days

- 0. Not present
- 1. Present but not exhibited in last 3 days
- 2. Exhibited on 1 of last 3 days
- 3. Exhibited on 2 of last 3 days
- 4. Exhibited daily in last 3 days

BALANCE

- a. Difficult or unable to move self to standing position unassisted
- b. Difficult or unable to turn self around and face the opposite direction when standing
- c. Dizziness
- d. Unsteady gait

PSYCHIATRIC

- e. Abnormal thought process—e.g., loosening of associations, blocking, flight of ideas, tangentiality, circumstantiality
- f. Delusions—Fixed false beliefs
- g. Hallucinations—False sensory perceptions

GI STATUS

- h. Acid reflux—Regurgitation of acid from stomach to throat

interRAI: Psychometric properties & standardization



Literature on validity and reliability

Standardized/normed



A Validity and Reliability Study of a Chinese Assessment Tool for Persons with Moderate to Severe Intellectual Disabilities

Christopher L.F. Chan, Claudia Lai, Iris Chi

Abstract

This study was designed to test the psychometric properties of the Chinese interRAI ID tool in a Chinese population with learning disabilities in Hong Kong. The interRAI ID was prepared based on the original interRAI ID which is a standardized instrument and is designed to evaluate the strengths, preferences, and needs of persons with ID living in various care settings. A sample of 100 people with moderate to intellectual disabilities was assessed with the Chinese interRAI ID and its criterion subscales of the interRAI ID, including the Cognitive Performance Scale, Depression, Aggressive Behavior Scale, Activities of Daily Living Hierarchy Scale, and Instrument Daily Living Involvement Scale, had high internal consistency (Cronbach's $\alpha = .66$ to test-retest reliability ($r = .96$ to $.99$); $\kappa = .68$ to $.81$). Comparison of the interRAI ID criterion measures supported concurrent and discriminant validity of these scales. The results provide preliminary support for the Chinese interRAI ID as a reliable and valid assessment Chinese individuals with learning disabilities in Hong Kong.



Research in Developmental Disabilities

Volume 30, Issue 3, May–June 2009, Pages 512–520



The social and recreational characteristics of adults with intellectual disability and pica living in institutions

John P. Hirdes^a, Lynn Martin^b

Journal of Policy and Practice in Intellectual Disabilities
Volume 4, Number 1, pp 23–29, March 2007

Development and Psychometric Properties of an Assessment for Persons With Intellectual Disability—The interRAI ID

Lynn Martin^a, John P. Hirdes^a, Brent E. Fries^b, and Trevor J. Smith^c

^aDepartment of Health Studies and Gerontology, University of Waterloo, Waterloo; ^bHome Research Institute, Waterloo; and ^cInstitute of Gerontology and School of Public Health, University of Michigan and Ann Arbor VA Medical Center, USA

Abstract This paper describes the development of the interRAI-Intellectual Disability (interRAI ID), a comprehensive that assesses all key domains of interest to service providers relative to a person with an intellectual disability (ID).

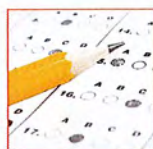
51

interRAI: Ease of use



Items are clear and understandable

Response options change throughout instrument



For functional status, scales completed for performance and capacity

1. IADL SELF-PERFORMANCE AND CAPACITY

Code for **PERFORMANCE** in routine activities around the home or in the community during the LAST 3 DAYS

Code for **CAPACITY** based on presumed ability to carry out activity as independently as possible. This will require "speculation" by the assessor.

0. **Independent**—No help, set-up, or supervision
1. **Set-up help only**
2. **Supervision**—Oversight/cueing
3. **Limited assistance**—Help on some occasions
4. **Extensive assistance**—Help throughout task, but performs 50% or more of task on own
5. **Maximal assistance**—Help throughout task, but performs less than 50% of task on own
6. **Total dependence**—Full performance by others during entire period
8. **Activity did not occur**—During entire period (DO NOT USE THIS CODE IN SCORING CAPACITY)

P – Performance C – Capacity P C

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interRAI: Instrument is respectful of service recipients



Focused on support needs

Items ask about social supports, including natural supports



1. STRENGTHS

0. No 1. Yes

a. Consistent positive outlook

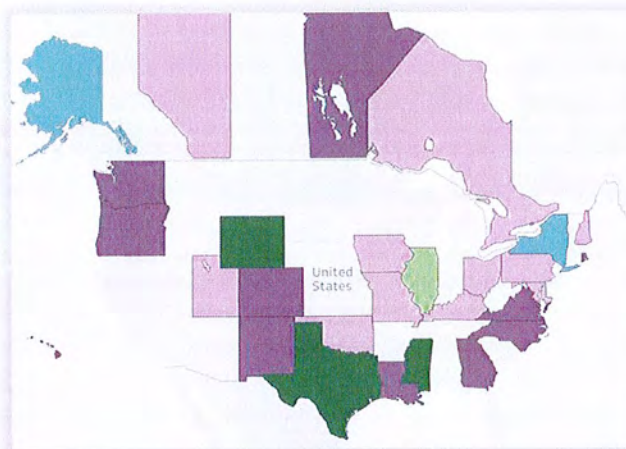
b. Finds meaning in day-to-day life

c. Reports having a confidant

d. Strong and supportive relationship with family

e. Reports strong sense of involvement in community

interRAI: Assessment tool uses



- Assessment**
- SIS (support budgets)
 - SIS
 - ICAP (support budgets)
 - ICAP
 - interRAI (considering)

interRAI: Technological infrastructure



No vendor associated with interRAI

No known experience with successfully implementing technology to support interRAI ID



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interRAI: Services available



Some support available via instrument developers about the instrument and its uses

No technology support or training



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interRAI: Process is respectful of service recipients



Respectful of diversity and culture

Service recipient leads responses

Not burdensome



Transparent scoring and level process

interRAI: Idaho-specific criteria

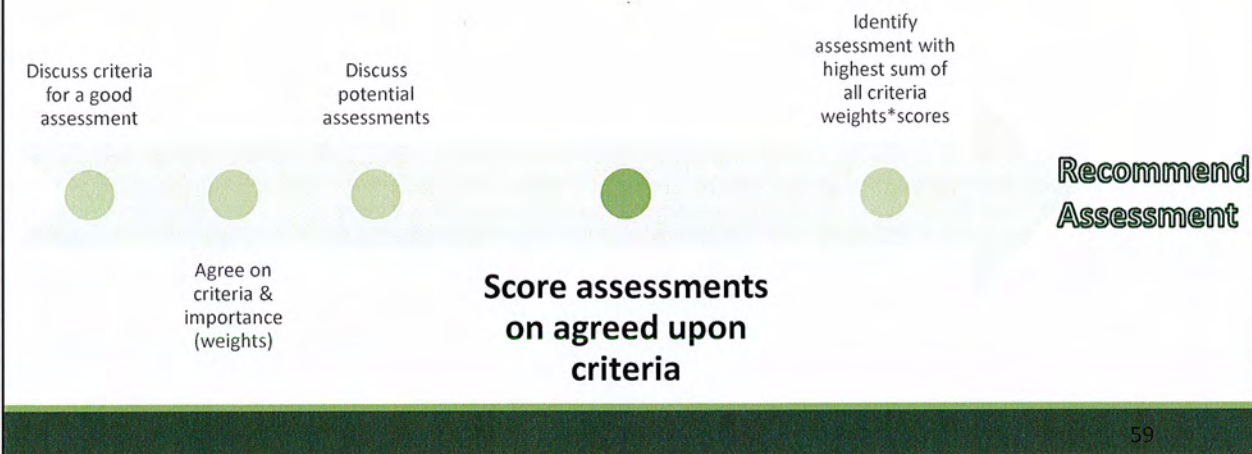


Statutory changes may be substantial

Timeframe for implementation may be hindered by unexplored level system, need for technology and training development



Next step:



Break up into small groups (for 1 hour)

Score each criteria as a group

Talk through rationale and take notes – you will need to defend scores in the full group

Use criteria definitions

Ask questions

Bring a score sheet with your final team scores to Colleen when finished

Human Services Research Institute
 Assessment Tool Selection Criteria Scoring
 Idaho Department of Health & Welfare Support Needs Assessment Selection Work Group

Assessment Scored:

Score the criteria as:
 0 = Does not meet criterion
 1 = Somewhat meets criterion
 2 = Mostly meets criterion
 3 = Completely meets criterion

See the Assessment Tool Selection Criteria Definitions for more information on each of the criteria below.

Instrument Properties	Score (Subtotal)	Notes
Background Information and content areas		
Background information	0 1 2 3	
ADA	0 1 2 3	
Health	0 1 2 3	
Cognition/Memory	0 1 2 3	
Medical conditions/Diagnoses	0 1 2 3	
Challenging behavior	0 1 2 3	
Medical and behavioral support needs		
Assesses medical support needs	0 1 2 3	
Assesses behavioral support needs	0 1 2 3	
Psychometric properties and standardization		
Documented validity	0 1 2 3	
Documented reliability	0 1 2 3	
Standardized/normed	0 1 2 3	
Ease of use		
Logic and understandable	0 1 2 3	
Concise response options	0 1 2 3	
Instrument is respectful of service recipients		
Strength-based and focused on support needed	0 1 2 3	
Respectful of diversity and culture	0 1 2 3	
Person-centered	0 1 2 3	

Small groups for scoring discussion

Group A	Group B	Group C
Jim Baugh	Art Evans	Michael Case
Christopher Baglio	Cameron Gilliland	Livia Ivascu
Cindy Day	Annette Wilkinson	Matt Wimmer
Elaine Ellison	Laura Johnston	Sarah Spalding
Cathy Libby	Cynthia Yee-Wallace	Jennifer La Jeunesse
Charina Newell	Richard Eppink	Christine Pisani
Susan Stumph	Venecia Andersen	Clay Smith
Nicole McKay	Karen Westbrook	Tim Voz

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Group discussion

Compare scores from teams and discuss

Rules:

1. We will discuss all criteria that were scored differently among teams
2. We will decide on a final score as a full group
3. If all teams scored a criterion with the same number, that number will be the final score (no discussion necessary)
4. If 2 out of 3 teams scored a criterion with the same number and the third team scored within +/-1 of that score, the majority score will be the final score (no discussion necessary)

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Next step:



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Outcome of assessment scoring

Now that the (SIS/ICAP/interRAI) has been identified as the highest scoring tool what additional considerations are necessary?

- What type of communications will be necessary to stakeholders?
- What are the implications if this tool is selected?
- How will various stakeholders react to this tool being utilized?
- Are there concerns with using this tool moving forward?
- Are there strengths that should be emphasized?

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Next Steps

HSRI will document process, decisions, and feedback from today in memo to DHW, including support needs assessment recommendation

Cost will be the major remaining consideration before selecting a final assessment

- SIS: \$38.75+ for bundled paper purchase (25 copies), \$95 for manual
- ICAP: \$235.90+ for bundled paper purchase (25 copies) and manual
- interRAI: \$168+ for paper purchase (100 copies), \$54.95 for manual

Beyond purchasing the instrument, there are additional costs to consider—

Additional Cost Considerations

Fees to Tool Owner	Assessor Training	Conducting Assessment	Data Management	Service Recipient Accessibility
<ul style="list-style-type: none"> • Physical instrument • Licensing for use • User manuals 	<ul style="list-style-type: none"> • Training materials/development • Assessor training • Certification (practice/testing) • Reliability checks 	<ul style="list-style-type: none"> • Scheduling • Assessment (staffing & travel) • Transcription (paper to electric) 	<ul style="list-style-type: none"> • Platform • Scoring & background programming 	<ul style="list-style-type: none"> • Personal assessment report • Descriptive materials (FAQs) • Tie to PCP practices

Feedback

Thank you for your hard work and commitment to helping select an assessment today!

Your feedback on the process?