

# **ALSAR-R2**

## **Assessment of Living Skills and Resources**

2008 ALSAR-Revised 2 Clemson, L., Bundy A., Unsworth, C. & Fiatarone Singh, M.

Adapted with permission from 1991 ALSAR-Revised Format, TJK Drinka, JH Williams, M Schram, J Farrell-Holtan & R Euhardy VAMC, Madison

<http://www.fhs.usyd.edu.au/ols/>

ALSAR-R2  
 Assessment of Living Skills and Resources

Name:
ID:
Address:
Date of Assessment:

ALSAR TASKS	SKILLS	S SKILL level	TASK Risk Score	R RESO URCE level	RESOURCES
	Individual task accomplishment is: 0 Independent & consistent 1 Partial performance 2 Not accomplished or no responsibility for doing		See scale below		Support for task completion extrinsic to individual is: 0 Consistently available 1 Inconsistently available, unstable or unreliable 2 <u>Insufficient or not used</u> * *Only use when Skill = 2
Telephoning	Locates phone numbers, dials sends and receives information				Resources for telephoning
Reading	Reads and uses written information				Resources for reading
Leisure	Plans and performs satisfying leisure activities				Resources for satisfying leisure activities
Medication Management	Procures and takes medicine as ordered				Resources for managing medications
Money Management	Manages finances, pays bills, does banking				Resources for managing finances
Transportation	Walks, drives or uses public transport				Resources for transportation
Shopping	Lists, selects, buys, gets, stores goods				Resources for shopping
Meal Preparation	Performs all aspects of meal preparation (planning, storage, cook & serve)				Resources for meal preparation
Laundering	Performs all aspects of doing laundering (carry, wash, dry & put away)				Resources for laundering
Housekeeping	Keeping dishes washed, cleaning own living space, sweeping paths				Resources for housekeeping
Home Maintenance	Clearing walks, mowing lawns, changing light globes, performs minor home repairs and maintenance				Resources for home maintenance

**Task Risk Score Scale (high scores at highest risk):**

“Skill-Resource” “0-0” = 0; “0-1” = 0; “1-0” = 1; “1-1” = 1; “2-0” = 2; “2-1” = 3; “2-2” = 4

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Recommended scoring of Risk (ALSAR-R2)

<p><b>SKILL</b></p> <p><b>Individual task accomplishment is:</b></p>	<p><b>RISK</b></p> <p><b>SKILL</b></p> <p><b>RESOURCES</b></p> <p><b>INCREMENTAL</b></p> <p><b>SCORE</b></p>	<p><b>RESOURCES</b></p> <p><b>Support for task completion extrinsic to individual is:</b></p>
<p>‘0’ Task accomplished independently &amp; consistently</p>	<p>‘00’ = 0</p> <p>‘01’ = 0</p>	<p>‘0’ Resources adequate to consistently accomplish the task</p> <p>‘1’ Resources only <i>partially support</i> task accomplishment. Maybe inconsistently available, unstable or unreliable.</p>
<p>‘1’ Partial task accomplishment</p>	<p>‘10’ = 1</p> <p>‘11’ = 1</p>	<p>‘0’ Resources adequate to consistently accomplish the task</p> <p>‘1’ Resources only <i>partially support</i> task accomplishment. Maybe inconsistently available, unstable or unreliable.</p>
<p>‘2’ Task not accomplished or no responsibility for doing</p>	<p>‘20’ = 2</p> <p>‘21’ = 3</p> <p>‘22’ = 4</p>	<p>‘0’ Resources adequate to consistently accomplish the task</p> <p>‘1’ Resources only <i>partially support</i> task accomplishment. Maybe inconsistently available, unstable or unreliable.</p> <p>‘2’ Resources are <u>insufficient for task accomplishment</u> or available resources are not being used<sup>1</sup></p>

<sup>1</sup>Resources ‘2’ Insufficient or not used category is not available for rating if Skill accomplished (‘0’) or if Skill partially accomplished (‘1’)

ALSAR-R2 Prompts to guide the interview and scoring of Skills and Resources

Suggested Skills Questions

Suggested Resources Questions

<u>Telephoning (Using the phone to send and receive information)</u>	
<ul style="list-style-type: none"> <li>• How often do you use the phone?</li> <li>• Do you make calls or only use the phone if someone calls you?</li> <li>• Can you hear the phone ringing?</li> <li>• Can you hear what is being said?</li> <li>• Can you get to the phone if it is ringing and use it?</li> <li>• What number would you dial for an emergency?</li> </ul>	<ul style="list-style-type: none"> <li>• Is the phone where it is needed, is it audible and in an accessible place?</li> <li>• How many phones do you have? (location)</li> <li>• Any special devices on your phone? Amplified handset? Large scale numbers on dial?</li> <li>• Are emergency phone numbers listed by each phone?</li> </ul>
<u>Reading (Using written information)</u>	
<ul style="list-style-type: none"> <li>• Do you have any difficulty reading?</li> <li>• What do you usually read?</li> <li>• Can you read newspaper size print, mail, medicine bottles?</li> <li>• Can you read dials on the TV, thermostats, appliances?</li> </ul>	<ul style="list-style-type: none"> <li>• Do you wear glasses? When was last eye test?</li> <li>• Do you have any low vision aids? Magnifier? Large print materials? Talking books?</li> <li>• Does someone read things for you?</li> </ul>
<u>Leisure (Using time not spent for work, sleep or self care)</u>	
<ul style="list-style-type: none"> <li>• What do you do in your spare time (for fun)?</li> <li>• Are you able to do your favorite leisure activity/s?</li> <li>• Do you have any hobbies / pastimes?</li> <li>• Are you active in any clubs or organizations?</li> <li>• Are there any activities that you have given up recently?</li> </ul>	<ul style="list-style-type: none"> <li>• Is there a senior centre near you?</li> <li>• How do you keep in touch with friends &amp; family?</li> <li>• How often do you see them? Talk to them?</li> <li>• Are there any activities you would like to begin?</li> <li>• Does someone go with you or take you to leisure activities?</li> </ul>
<u>Medication Management (Taking medicine as ordered, renewing prescriptions)</u>	
<ul style="list-style-type: none"> <li>• Do you take any medications? How many? How often?</li> <li>• What are they for?</li> <li>• How often do you forget to take your medications?</li> <li>• How do you renew your prescriptions?</li> </ul>	<ul style="list-style-type: none"> <li>• Does anyone help you take your medicine or re-order medicine?</li> <li>• Do you have a system for taking medications?</li> <li>• Do you have insurance to cover medications?</li> <li>• Any medications you don't take because you can't pay for them?</li> </ul>
<u>Money Management (Managing finances, paying bills, banking)</u>	
<ul style="list-style-type: none"> <li>• How do you manage your finances? Pay the bills?</li> <li>• How do you do the banking, get cash?</li> <li>• Do you use a checking account?</li> <li>• Can you live within your income?</li> <li>• How do you do your taxes?</li> </ul>	<ul style="list-style-type: none"> <li>• Does anyone help you with finances? Does someone else make financial decisions for you?</li> <li>• Who makes sure the bills are paid?</li> <li>• Do you bank in person or by mail?</li> <li>• Do you have power of attorney?</li> </ul>
<u>Transportation (Walking, driving and using public transit)</u>	
<ul style="list-style-type: none"> <li>• Do you drive? At night? Do you drive out of town or only in town?</li> <li>• Are there restrictions on your license?</li> <li>• Do you use public transportation?</li> <li>• Do you arrange for your own transportation?</li> </ul>	<ul style="list-style-type: none"> <li>• How do you get around?</li> <li>• Do you have a person drive you?</li> <li>• Are your methods of transportation reliable?</li> </ul>
<u>Shopping (Listing, selecting, carrying and storing items)</u>	
<ul style="list-style-type: none"> <li>• Do you do your own shopping?</li> <li>• Do you carry your purchases?</li> <li>• How often do you go shopping?</li> <li>• Do you ever shop by mail or phone?</li> </ul>	<ul style="list-style-type: none"> <li>• Does someone shop for you?</li> <li>• Is that person available when you need them?</li> <li>• Are there stores located near you?</li> <li>• Do you use anything to carry your purchases?</li> </ul>
<u>Meal Preparation (Food planning, storage, cooking &amp; serving)</u>	
<ul style="list-style-type: none"> <li>• Do you cook your meals?</li> <li>• Do you prepare your own snacks, breakfast or lunch?</li> <li>• What do you do when your regular system for meals is not available?</li> </ul>	<ul style="list-style-type: none"> <li>• Are there restaurants or meals sites that you use?</li> <li>• Does someone cook for you?</li> <li>• Are your kitchen appliances adequate?</li> </ul>
<u>Laundry (Carrying, washing, drying &amp; putting away clothing)</u>	
<ul style="list-style-type: none"> <li>• Do you do your laundry?</li> <li>• Do you do sorting? Carrying? Folding? Putting away? Hang on line/ place in dryer?</li> <li>• How often is laundry done? Do you arrange for laundry service?</li> </ul>	<ul style="list-style-type: none"> <li>• Does someone do the laundry?</li> <li>• Where is the washer / dryer / clothes line located?</li> <li>• What do you use to carry the laundry?</li> <li>• Are the laundry facilities adequate?</li> </ul>
<u>Housekeeping (Keeping dishes washed, pathways clear, rooms clean)</u>	
<ul style="list-style-type: none"> <li>• Do you do the housekeeping?</li> <li>• Do you do light work such as dishwashing, dusting, vacuuming?</li> <li>• How often do you do the housekeeping?</li> <li>• Do you arrange for housekeeping services?</li> </ul>	<ul style="list-style-type: none"> <li>• Does someone do your housekeeping? How often?</li> <li>• Are these services adequate?</li> <li>• Could you afford housekeeping services?</li> </ul>
<u>Home maintenance (Controlling temperature, clearing walks &amp; mowing lawns)</u>	
<ul style="list-style-type: none"> <li>• What type of house do you live in?</li> <li>• How do you do the outdoor work? Lawn? Paths? Windows?</li> <li>• How do you do major (e.g. Fix leaking tap) or minor (e.g. Change light bulb) repairs?</li> <li>• Do you have adequate heating in winter and cooling in summer?</li> </ul>	<ul style="list-style-type: none"> <li>• Does someone maintain your home for you?</li> <li>• What equipment do you have for home upkeep (e.g. Tools, ladder, lawn mower)?</li> <li>• Are maintenance supports readily available and reliable?</li> </ul>

# ALSAR-R2 Definitions

The Assessment of Living Skills and Resources, ALSAR, is an instrument developed to help health professionals assess instrumental activities of daily living. It focuses on accomplishment of tasks rather than potential capabilities. It is completed as an interview, supplemented with observation of skills whenever possible. Use the following definitions to score the Skill and Resource levels.

Rate the skill for a given task first, and then rate the Resource for the task. Use the Guidelines for a list of suggested prompts/questions. Limited space is provided to make brief comments explaining the reasons. This should be done to assist with action planning and prioritizing

## Skill

***SKILL*** is defined as **accomplishment of the task by the person.**

Rated on a scale of 0-2 according to *the level of accomplishment*:

- 0 Independent and *consistent* performance (e.g. prepares all meals or eats out regularly- able to do consistently and independently)
- 1 Partial performance (e.g. prepares some meals but does not take responsibility for all of them).
- 2 Task not accomplished or no responsibility for task (e.g. spouse does this).

If the person claims to be accomplishing a task but appearances suggest otherwise, a rating of 2 (or 1) is assigned to reflect the incongruity and the need for further evaluation.

The reasons the person may be dependent can vary, for instance, motivational, cognitive, physical, cultural, or personal reasons.

See additional explanations and examples for defining skill on the following page.

## Resource

***RESOURCE*** is defined as **support for task accomplishment extrinsic to the person.**

Resources are rated after the skill level. Resources may be human or technical, formal or informal. They may include but are not limited to persons, equipment, services, and agencies. Examples of resources for meal preparation are a spouse, caregiver, a microwave oven, restaurants, and home-delivered meals.

Rated on a scale of 0-2 according to *the level of availability and consistency of use*.

- 0 Resources are *adequate* to consistently accomplish the task (e.g. a full-time caregiver provides all meals)
- 1 Resources only *partially support* task accomplishment. A needed resource appears to be unstable, inconsistent, or unreliable or the caregiver providing the resource is evidencing strain (e.g. if the meals are only provided 5 days per week).
- 2 Resources are *insufficient* for task accomplishment or available resources are not being used (e.g., delivered meals are not available and person declines meals on wheels or other help).

A rating of 2 (or 1) is given if a safety factor or loss of the resource is imminent (e.g. home delivered meals are ending, the caregiver is going into hospital).

## Additional explanations and examples

The following are some examples to assist in defining some **SKILL** situations:

- If the partner or spouse takes full responsibility and prepares all meals, does the laundry, housekeeping or home maintenance then they are given a 2 rating. If a person prepares breakfasts and snacks but gets Meals On Wheels as a resource, then their skill level is 1.
- Shopping. If the person never did the shopping now or in the past, then rate as 2.
- If the task has not yet “been accomplished” since returning home from hospital then give a 2 reflecting need for further evaluation at a later stage.
- Deciding what tasks are necessary for full independent accomplishment can sometimes vary depending upon what is culturally “normal practice.” For example, Laundry- drying tasks may or may not include using the clothes line. For instance, if the person is in a unit with a dryer and no clothes lines are available, then it is normal practice for these tenants to use the dryer -- then using a clothes line would not be considered necessary for full independence. Please do not confuse “normal practice” with an adaptation that a person has made over time. If they stopped using the clothes line because it was becoming difficult then this is an adaptation and not considered “usual practice” and is rated 1 for partial performance.
- Medication management: this includes being able to renew their medications. Do not include transport issues here if this has already been included in the transportation category.
- Money management: managing finances, paying bills and handling banking should all be included as skills. Again do not include support for transportation to the bank (e.g. daughter drives her to bank) as this is included in the transportation category. Banking via phone, internet, cheque and use of a card for cash would be rated 0 if all money management is done this way independently and there is no need to go to the bank. This is now an acceptable “normal practice.” If the person has some restriction or limitation in using the ATM then rate 1 or 2 accordingly. If the person chooses to go to the teller because that is their preference (and is still normal practice for many people) then rate 1 or 2 if they are unable to do this.

The following may assist in defining **RESOURCES**

- Caregiver capability and reserves are both important in rating the resource level. If the caregiver provides resources for a task but is evidencing strain (e.g. resents responsibility for meal preparation) to the extent that you believe that the strain has an impact on the consistency of the support, the resource should be rated as 1

# ALSAR-R2 Keyform

																Name: ID: Address: Date of Assessment:														
1.81	0.99	0.72	0.51	0.42	0.37	0.38	0.42	0.46	0.55	0.65	1.05	1.85	S.E.																	
6	5	4	3	2	1	0	-1	-2	-3	-4	-5	-6	Measure																	
Low risk														High risk																
0	1	2	3	4	5	6	7	8	9	10	12	14	16	18	20	22	24	26	28	30	32	34	36	38	40	41	42	43	44	Raw Score
0	-	10	-	10	-	20	-	21	-	22																	HOME MAINTENANCE			
0	-	10	-	10	-	20	-	21	-	22																	HOUSEKEEPING			
0	-	10	-	10	-	20	-	21	-	22																	LAUNDRY			
0	-	10	-	10	-	20	-	21	-	22																	MEAL PREPARATION			
0	-	10	-	10	-	20	-	21	-	22																	SHOPPING			
0	-	10	-	10	-	20	-	21	-	22																	TRANSPORT			
0	-	10	-	10	-	20	-	21	-	22																	MONEY MANAGEMENT			
0	-	10	-	10	-	20	-	21	-	22																	MEDICATION MANAGEMENT			
0	-	10	-	10	-	20	-	21	-	22																	LEISURE			
0	-	10	-	10	-	20	-	21	-	22																	READING			
0	-	10	-	10	-	20	-	21	-	22																	TELEPHONE			

## References

- Clemson L, Bundy A, Unsworth, C. & Fiatarone Singh, M. (in press) Validation of the modified Assessment of Living Skills and Resources (ALSAR), an IADL measure for older people. *Disability and Rehabilitation*
- Clemson L, Bundy A, Kay L, Lockett T. Refining an IADL measure by determining rating scale category functioning. Australian Consortium for Political and Social Research (ACPRSI) - Social Science Methodology Conference; 2007 10-13th December, 2006; University of Sydney: Australian Council for Educational Research Available: <http://www.acspri.org.au/conference2006/proceedings>; 2007.
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