Performance Assessment of Self-Care Skills

Scoring Guidelines

(Rogers, JC, Holm, MB, & Chisholm, D, 2016)
Version 4.1

Created by Mills (2002)
Edited by Raina (2004, 2009)
Revised by Raina (2014)
Revised by Rogers, Holm, & Chisholm, (2016)
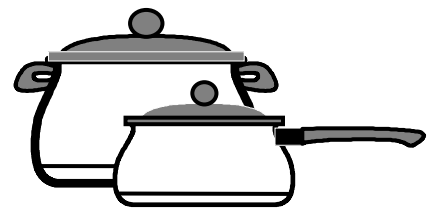
Performance Assessment of Self-Care Skills (PASS)
Version 4.1

The PASS consists of 26 core tasks/items: 5 functional mobility (FM), 3 basic activities of daily living (BADL) or self-care tasks, 14 instrumental activities of daily living with a cognitive emphasis (IADL-C), and 4 instrumental activities of daily living with a physical emphasis (IADL-P).

The PASS is criterion-referenced, that is the client is rated according to established performance criteria. Each item stands alone, that is, all 26 core tasks of the PASS are validated and reliable. All items may be administered in total or select items (one or more) relevant for a specific client can be administered.

The PASS consists of two versions – Clinic and Home. The tasks, subtasks, and rating criteria in the Clinic and Home versions are identical, except that the materials used for select tasks may be different. For example, for the medication management task, the Clinic prescription labels on the medications are generated for the PASS; whereas for the Home version clients use their own medications. Because the two versions are equivalent and interchangeable, the Clinic and Home versions can be used as pre- and post-test measures.

Several factors may affect the sequencing of the tasks including the set-up of the clinic or home environments, the client's choice, easier items first, and/or the most efficient method for task administration.

✓ A general rule is to begin with the items typically performed in a bedroom, such as bed mobility, dressing, etc.

✓ The examiner may alternate between items that are more cognitively based (e.g., shopping, medication management, obtaining critical information) and items that require more physical exertion (e.g., indoor walking, taking out the garbage, sweeping), which is how the items are currently arranged in the assessment.

✓ The 4 items included for meal preparation (oven use, stovetop use, use of sharp utensils, and clean up after meal preparation) are typically performed last.

The electronic files containing the PASS Home and Clinic versions are in the correct order/format to be printed 2-sided with pages flipped on the long side (landscape).

3-hole punch the pages on the top long side of the landscape pages.

Place the PASS forms in a 3-ring binder so that the task name, conditions, and instructions are visible at the top of the open binder and the scoring form is visible at the bottom of the open binder.

The next page provides an outline of the PASS forms.

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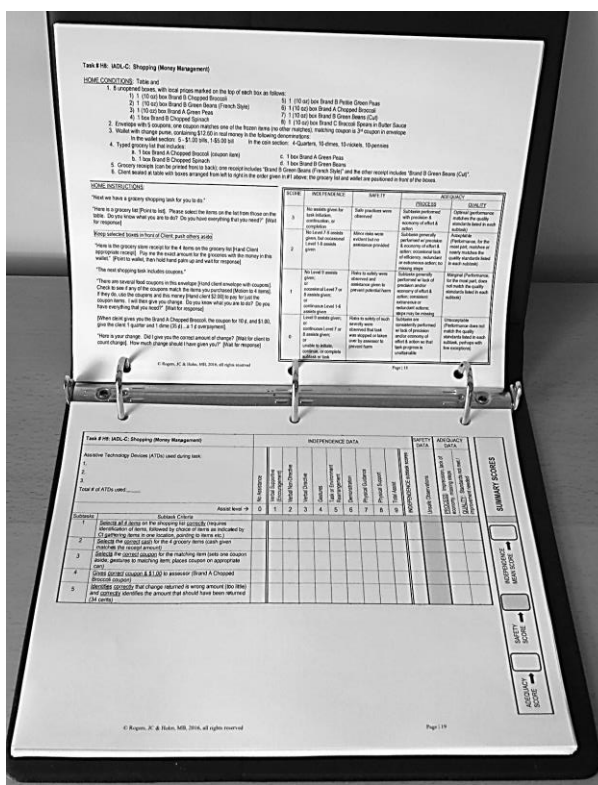
Task Title

Task # H8: IADL-C: Shopping (Money Management)

HOME CONDITIONS: Table and
1. 8 unopened boxes, with local prices marked on the top of each box as follows:
   - 1) 1 (10 oz) box Brand B Chopped Broccoli
   - 2) 1 (10 oz) box Brand B Green Beans (French Style)
   - 3) 1 (10 oz) box Brand A Green Peas
   - 4) 1 box Brand B Chopped Spinach
   - 5) 1 (10 oz) box Brand B Petite Green Peas
   - 6) 1 (10 oz) box Brand A Chopped Broccoli
   - 7) 1 (10 oz) box Brand B Green Beans (Cut)
   - 8) 1 (10 oz) box Brand C Broccoli Spears in Butter Sauce

Task Conditions

2. Envelope with coupons; one coupon matches one of the frozen items (no other matches); matching coupon is 3rd coupon in envelope
3. ... urse, containing $12.60 in real money in the following denominations:
   ... ction: 5 - $1.00 bills, 1-$5.00 bill   In the coin section: 4-Quarters, 10-dimes, 10-nickels, 10-pennies
4. Typed grocery... that includes:
   - a. 1 box Brand A Chopped Broccoli (coupon item)
   - b. 1 box Brand B Chopped Spinach
   - c. 1 box Brand A Green Peas
   - d. 1 box Brand B Green Beans
5. Grocery receipts (can be printed front to back); one receipt includes "Brand B Green Beans (French Style)" and the other receipt includes "Brand B Green Beans (Cut)".
6. Client seated at table with boxes arranged from left to right in the order given in #1 above; the grocery list and wallet are positioned in front of the boxes.

HOME INSTRUCTIONS:

"Next we have a grocery shopping task for you to do."

"Here is a grocery list [Point to list]. Please select the items on the list from those on the table. Do you know what you are to do? Do you have everything that you need?" [Wait for response]

Keep selected boxes in front of Client; push others aside

Task Instructions

... for the 4 items on the grocery list [Hand Client
... xact amount for the groceries with the money in this
... old hand palm up and wait for response]

"The next shopping task includes coupons."

"There are several food coupons in this envelope [Hand client envelope with coupons]. Check to see if any of the coupons match the items you purchased [Motion to 4 items]. If they do, use the coupons and this money [Hand client $2.00] to pay for just the coupon items. I will then give you change. Do you know what you are to do? Do you have everything that you need?" [Wait for response]

[When client gives you the Brand A Chopped Broccoli, the coupon for 10 ¢, and $1.00, give the client 1 quarter and 1 dime (35 ¢)...a 1 ¢ overpayment].

"Here is your change. Did I give you the correct amount of change? [Wait for client to count change]. How much change should I have given you?" [Wait for response]

Scoring Criteria

SCORE	INDEPENDENCE	SAFETY	ADEQUACY	
			PROCESS	QUALITY
3	No assists given for task initiation, continuation, or completion	Safe practices were observed	Subtasks performed with precision & economy of effort & action	Optimal (performance matches the quality standards listed in each subtask)
2	No Level 7-9 assists given, but occasional Level 1-6 assists given	Minor risks were evident but no assistance provided	Subtasks generally performed w/ precision & economy of effort & ac...	Acceptable (Performance, for the most part, matches or ...
1	No Level 9 assists given; or occasional Level 7 or 8 assists given; or continuous Level 1-6 assists given.	Risks to safety were observed and assistance given to prevent potential harm	Subtasks generally performed w/ lack of precision and/or economy of effort & action; consistent extraneous or redundant actions; steps may be missing	Marginal (Performance, for the most part, does not match the quality standards listed in each subtask)
0	Level 9 assists given; or continuous Level 7 or 8 assists given; or unable to initiate, continue, or complete subtask or task	Risks to safety of such severity were observed that task was stopped or taken over by assessor to prevent harm	Subtasks are consistently performed w/ lack of precision and/or economy of effort & action task progress unattainable	Unacceptable (Performance does not match the quality standards listed in each subtask, perhaps with few exceptions)

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Summary Scores

Task # H8: IADL-C: Shopping (Money Management)

Task Title

INDEPENDENCE DATA

Assistive Technology Devices (ATDs) used during task:
1.

Assistive Technology Devices

Levels of Assistance

Total # of ATDs used: _____

Subtasks	Subtask Criteria	No Assistance	Verbal Supportive (Encouragement)	Verbal M...	Verbal Dire...	Gestures	Task or En... Rearrang...	Demonstrat...	Physical G...	Physical	Total Assist	INDEPENDENCE subtask score	Unsafe Observations	PROCESS: Imprecision, lack of economy, missing steps	QUALITY: Standards not met / improvement needed	SUMMARY SCORES
	Assist level →	0	1	2	3	4	5	6	7	8	9					
1	Selects all 4 items on the shopping list correctly (requires identification of items followed by choice of items as indicated by ... gathering items in ... location, pointing to items etc.)															
2	... the 4 grocery items (cash given															
3	... 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)															

Subtasks and Criteria

Independence Data

Safety Data

Adequacy Data

INDEPENDENCE MEAN SCORE ↑

SAFETY SCORE ↑

ADEQUACY SCORE ↑

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Scoring System for the PASS – Clinic and Home

Items are rated on a predefined 4 point (0-3) ordinal scale.

The scoring system is identical for each task/item and yields three scores: task independence, task safety, and task adequacy.

The instruction and rating sheet formats are the same for each task/item.

The assistive technology devices (ATDs) used by a client when performing a task are documented in the top left section of the rating form. NOTE: the client is not penalized for use of ATDs.

Directly below the ATDs section are numbered rows for the subtasks.

To the right are columns to record the independence data – the types of assistance provided by the examiner for each subtask (from "no assistance" to "total assist").

The next column is to enter the independence scores for each subtask which are derived from the raw data.

The next column to the right is for entering the safety data. Unsafe observations by the examiner are recorded in this column.

The next two columns to the right are for entering the task adequacy data. Inefficiency in performance of subtasks is recorded in the process column and task performance of a subtask that is of unacceptable quality is checked in the quality column.

The final column is to record the summary scores derived from the task independence, task safety, and task adequacy raw data.

Task # H8: IADL-C: Shopping (Money Management)	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 subtask scores	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 / Subtask Criteria															
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 ↑

Scoring Guidelines for INDEPENDENCE DATA

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

Level 0. No Assistance – no assistance from another person.

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; often stated in the form of a question (e.g., "is there anything missing", "can you 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 – modification made to task objects, environment, or presentation to facilitate task initiation, continuation, or completion (e.g., placing a stool under the client's foot when donning shoes, removing task objects that are distracting and then presenting them as needed; breaking down the task into smaller steps).

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 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.

Summary of Hierarchy of Assists:

None	0	No assistance
Verbal	1	Verbal support (encouragement)
	2	Verbal non-directive cues (alert that something is not right)
	3	Verbal directive cues (tell what to do next)
Gestures	4	Gestures (point at task object)
	5	Task/environment rearrangement (break task down)
	6	Demonstration (demonstrate followed by return performance)
Physical	7	Physical guidance ("hands down" – move body/extremity)
	8	Physical support ("hands up" – lift body part/object)
	9	Total assist (do task or subtask for the person)

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Level 0 is no assistance from another person. 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 self as well as the client. Level 9 is used when the examiner does all or most of the subtask for the client. Levels 4 through 9 can include verbal statements.

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/or adequacy.

Although the examiner should provide the least amount of assistance followed by progressively greater assistance as needed during task performance, at times the examiner will need to directly provide a higher level of assistance (i.e., safety issue, client exhibits increased frustration). The examiner must use his/her clinical judgment to determine the appropriate level of assistance.

As a general rule, if the examiner provides 3 prompts at a specific level of assistance for a single subtask this indicates that a higher level of assistance is needed.

The type and number of prompts are recorded by the examiner with a check (√) in the appropriate box for each subtask, in order to identify the level of support or assistance needed for task performance, and the type and number of assists that enable successful task performance. If no assistance is provided for performance of a subtask, the examiner marks an X in the No Assistance column.

The following is an example of recording INDEPENDENCE DATA:

Task # H8: IADL-C: Shopping (Money Management)		INDEPENDENCE DATA											SAFETY DATA	ADEQUACY DATA		
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 subtask scores	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	Subtask Criteria															
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)	X														
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)			√	√		√				√					

SUMMARY SCORES

INDEPENDENCE MEAN SCORE

SAFETY SCORE

ADEQUACY SCORE

Columns 0 (No Assistance) through 9 (Total Assist) comprise the INDEPENDENCE DATA.

The examiner may write notes or remarks on the rating form to assist in recall of the specifics of task performance.

The INDEPENDENCE scores for subtasks are derived based on the following criteria:

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

The Independence scores for all subtasks are then averaged (mean), yielding an INDEPENDENCE MEAN SCORE ranging between 0-3. This score is then entered in the last column in the box labelled INDEPENDENCE MEAN SCORE. For example, for Task #8, Shopping (Money Management) (see below), for the 5 subtasks that are listed, the sum of the Independence Scores for Subtasks is 8. The mean INDEPENDENCE SUMMARY SCORE (INDEPENDENCE MEAN SCORE) is 1.6 (8/5 = 1.6). The INDEPENDENCE MEAN SCORE is rounded down to the nearest decimal. Scores are not rounded up as doing so may reflect an overestimation of a client's task independence.

Scoring Guidelines for the SAFETY DATA

The examiner enters a check (√) in the column for <u>SAFETY DATA</u> (Unsafe Observations) if a risk or risks to safety is observed during task performance or if the examiner is required to intervene because of a risk to safety. A single check (√) is recorded for one or more safety risks for the appropriate subtask when the safety risk(s) occurred.

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The degree of unsafe observations (checks for SAFETY DATA) are used to determine the SUMMARY SCORE for SAFETY.

Notes about the safety risk(s) may be written on the rating form to assist in recall of the specifics of task performance.

The entire task receives <u>a single SAFETY SCORE</u>; <u>each subtask does not receive a safety score</u>. The SAFETY SCORE is derived based on the following criteria:

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

The safety summary score is placed in the box labeled SAFETY 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 subtask scores	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	Subtask Criteria														
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)	X										3			
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			
5	Raises self off bed in a controlled manner (does not "rock" to gain momentum)	X										3			
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: **3**

SAFETY SCORE: **2**

ADEQUACY SCORE: [ ]

Some subtasks have no immediate physical safety risk (e.g., selects the correct cash for the 4 grocery items). The unsafe observations box has been shaded if there is no potential safety risk for the subtask. For some tasks (e.g., shopping), none of the subtasks have a potential safety risk. For these tasks, in addition to the individual subtask box for unsafe observations being shaded, the SAFETY SUMMARY SCORE box has been also shaded.

Task # H8: IADL-C: Shopping (Money Management)		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 subtask scores	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	Subtask Criteria														
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: [shaded]

ADEQUACY SCORE: [ ]

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Scoring Guidelines for Adequacy of Outcome (ADEQUACY) DATA

The task ADEQUACY DATA are derived from the PROCESS involved in the subtask performance and the QUALITY of the subtask performance.

Each subtask includes a double underlined action verb or phrase describing the subtask PROCESS, and a single underlined word describing the optimal QUALITY outcome for the subtask, with examples in parentheses.

Sample PROCESS action verbs or phrases	Sample optimal QUALITY subtask outcomes
Lowers self onto bed	in a controlled manner (does not "plop" down)
Selects all 4 items	correctly (requires identification of items)
Rinses brush	thoroughly (removes paste, particles)
Writes the signature	correctly (writes first, followed by last name)

Prompts (assistance) may be provided to the client for concerns about the subtask process, the subtask quality or both. A single check (√) is placed in the process box if a prompt is given for the subtask process, or there is a concern about the subtask process. A single check (√) is placed in the quality box if a prompt is given for subtask quality, or there is a concern about subtask quality.

Note: A prompt (assistance) does not have to be given in order for there to be a concern about process or quality. Therefore, there can be a check in the process box(s) and/or quality box(s) without any checks under INDEPENDENCE DATA or SAFETY DATA.

Task # H8: IADL-C: Shopping (Money Management)	INDEPENDENCE DATA											SAFETY DATA	ADEQUACY DATA		SUMMARY SCORES
Assist level →	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 subtask scores	Unsafe Observations	PROCESS: Imprecision, lack of economy, missing steps	QUALITY: Standards not met / improvement needed	

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

Subtasks	Subtask Criteria	0	1	2	3	4	5	6	7	8	9	INDEP score	Unsafe	PROCESS	QUALITY
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			√
2	Selects the correct cash for the 4 grocery items (cash given matches the receipt amount)	X										3		√	
3	Selects the correct coupon for the matching item (sets one coupon aside; gestures to matching item; places coupon on appropriate can)			√	√√	√	√	√				1		√	√
4	Gives correct coupon & $1.00 to assessor (Brand A Chopped Broccoli coupon)				√							2		√	
5	Identifies correctly that change returned is wrong amount (too little) and correctly identifies the amount that should have been returned (34 cents)			√	√		√				√	0		√	√

SUMMARY SCORES: 1.6 — INDEPENDENCE MEAN SCORE
SAFETY SCORE
ADEQUACY SCORE

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Notes about the client's process and quality may be written on the rating form to assist in recall of the specifics of task performance.

The number checks for the ADEQUACY DATA (quality and process) is used to determine the ADEQUACY SUMMARY SCORE. The ADEQUACY SUMMARY SCORE is based on the total task, using the combined task process and task quality data.

The entire task receives a single ADEQUACY SCORE; each subtask does not receive a process, quality or adequacy score. The ADEQUACY SCORE is derived based on the following criteria:

SCORE	ADEQUACY	
	PROCESS	QUALITY
3	Subtasks performed with precision & economy of effort & action	Optimal (performance matches the quality standards listed in each subtask)
2	Subtasks generally performed w/ precision & economy of effort & action; Occasional lack of efficiency, redundant or extraneous actions; no missing steps	Acceptable (Performance, for the most part, matches or nearly matches the quality standards listed in each subtask)
1	Subtasks generally performed w/ lack of precision and/or economy of effort & action; consistent extraneous or redundant actions; steps may be missing	Marginal (Performance, for the most part, does not match the quality standards listed in each subtask)
0	Subtasks are consistently performed w/ lack of precision and/or economy of effort & action so that task progress is unattainable	Unacceptable (Performance does not match the quality standards listed in each subtask, perhaps with few exceptions)

Helpful Hint . . . the best way to derive the ADEQUACY SUMMARY SCORE is to cover up the INDEPENDENCE DATA and the SAFETY DATA and make a clinical judgment about task ADEQUACY using only the process and quality data. If task process and quality yield different scores, the lower score is used so that the client is not put in a situation of risk through overestimation of task adequacy.

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Establishing Inter-Observer Reliability

Inter-observer (inter-rater) reliability or agreement is the degree of agreement among assessors (raters). It determines the degree of consensus there is in the ratings given by assessors. If assessors do not agree at an acceptable level, the assessors would benefit from additional training. Inter-observer reliability can be measured by calculating the number of agreements in observations divided by the total number of observations. When establishing inter-observer reliability it is best to use an assessor who has been formally trained to administer the PASS (e.g., attended a PASS workshop) as the anchor assessor for comparison of ratings.

Step 1: Determine the number of possible observations/ratings/scores for the PASS task item. For example, the shopping task (item #8) has 67 possible observations/ratings/scores (see below – each possible observation/rating/score is represented by black dots).

Task # H8: IADL-C: Shopping (Money Management)		INDEPENDENCE DATA											SAFETY DATA	ADEQUACY DATA		SUMMARY SCORES
		No Assistance	Verbal Supportive (Encouragement)	Verbal Non-Directive	Verbal Directive	Gestures	Task or Environment Rearrangement	Demonstration	Physical Guidance	Physical Support	Total Assist	INDEPENDENCE subtask scores	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	Subtask Criteria															
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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Step 2: Assessors (including anchor assessor) observes client perform task and individually documents observations and completes ratings/scores.

Step 3: Compare assessors' observations/ratings/scores with the anchor assessor's observations/ratings/scores. NOTE: all observation/rating/score "cells" are compared, including those that do not have a check (√).

Step 4: Determine the number of observations/ratings/scores that are in agreement.

Step 5: Calculate the percent agreement between the assessor and the anchor assessor by dividing the number of "cells" the assessor observes/rates/scores the same as the anchor assessor. For example, if the assessor has the same observations/ratings/scores as the anchor assessor for 61 or 67 "cells" the percent agreement is 91% (61 ÷ 67). NOTE: 80% or greater is preferred.

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Item Construction Mechanics for PASS Item Development

The following sequence is how a PASS item is developed.

Step	√	Instructions for Item Construction
1		Identify a task. Contact the PASS authors (Dr. Joan C. Rogers, Dr. Margo B. Holm and Dr. Denise Chisholm) at PASS@shrs.pitt.edu let them know that you plan to develop a PASS item for X task as there may already be an item completed for the task or it may be in process.
2		Identify critical task actions in the sequence in which they typically occur during task performance. Note: The critical task actions are the "subtask criteria" necessary for independent, safe and adequate performance.
3		Begin each subtask 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>.
4		The <u>PROCESS</u> modifier is the double underlined critical observable behavior in the subtask. For example, <u>Lowers self onto the bed</u>.
5		Identify the <u>QUALITY</u> modifier with a <u>single</u> underline. For example, <u>correctly</u> or <u>appropriately</u> or <u>legibly</u>. Note: 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)
6		If the immediate physical safety of a client cannot be at risk during performance of the subtask then shade the SAFETY DATA column cell gray. 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 so the SAFETY DATA column cell for the subtask is shaded gray.
7		Have several examiners review the sequence and criteria of the subtasks, and rate their concurrence with the sequence, whether each subcomponent is "critical" or not for community living and whether the behaviors are observable. Also have them rate whether the adequacy modifiers are appropriate, meaning that quality and/or process are applicable and observable.
8		Identify the CONDITIONS that must be present. Include (a) task items that the examiner will provide; (b) task items that the client needs to provide; (c) set up (table layout, etc.); and (d) starting position of client. When there are several mini-tasks involved in a task (See Task 21, Environmental Awareness), outline each new scenario that requires a change in position for the assessor and the client.
9		Identify the INSTRUCTIONS that will be given to the client. Include the verbal and gestural instructions the assessor will give to the client. 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 in the instructions. For example: Pt facing the rolled up scatter rug
10		Observe peers, clients and/or volunteers perform the task and subtasks and rate them. If necessary, modify what is "critical" as well as the conditions and directions. Also, send the draft of your subtask criteria, CONDITIONS, and INSTRUCTIONS to the PASS authors (Dr. Joan C. Rogers, Dr. Margo B. Holm, and Dr. Denise Chisholm) at PASS@shrs.pitt.edu for their review and feedback.
11		Identify the adaptation source and reference the PASS. For example: Cardell, B (University of Utah) adaptations to the Performance Assessment of Self-Care Skills (PASS-Home) - ©Rogers, JC, & Holm, MB, 2016, all rights reserved
12		Please send the final version of the revised/adapted items to the PASS authors (Dr. Joan C. Rogers, Dr. Margo B. Holm, and Dr. Denise Chisholm) at PASS@shrs.pitt.edu

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