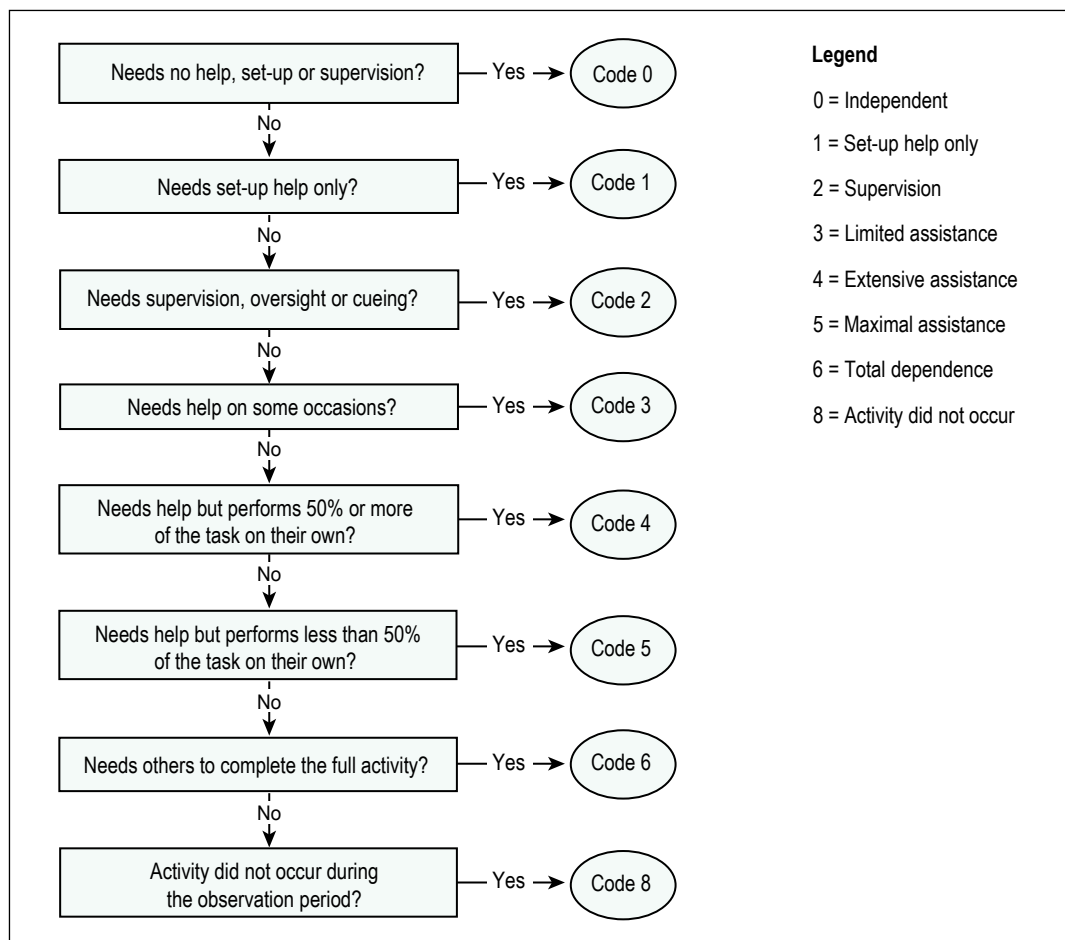# interRAI HC (IRRS): IADL Self-Performance and Capacity (G1)

The intent of item G1: IADL Self-Performance and Capacity is to examine the areas of function that are most commonly associated with independent living (instrumental activities of daily living, or IADLs). Each item should be scored in 2 categories: self-performance and capacity. It is important to distinguish between non-performance that is due to impairment of capability (caused by health problems) and non-performance that is due to other factors (not related to the person's health).

Performance: Measures what the person actually did within each IADL category in the last 3 days. Do not base coding on what the person might be capable of doing (see Capacity below).

When a person requires varying levels of assistance during an IADL task, code for the **most dependent episode** during the observation period. If there was only 1 performance episode during the 3-day observation period, base the score on that single episode.

Capacity: Code based on the person's presumed ability to carry out the activity. This may require speculation and clinical judgment by the assessor.

Flowchart:

- Needs no help, set-up or supervision? — Yes → Code 0
  - No ↓
- Needs set-up help only? — Yes → Code 1
  - No ↓
- Needs supervision, oversight or cueing? — Yes → Code 2
  - No ↓
- Needs help on some occasions? — Yes → Code 3
  - No ↓
- Needs help but performs 50% or more of the task on their own? — Yes → Code 4
  - No ↓
- Needs help but performs less than 50% of the task on their own? — Yes → Code 5
  - No ↓
- Needs others to complete the full activity? — Yes → Code 6
  - No ↓
- Activity did not occur during the observation period? — Yes → Code 8

Legend

0 = Independent
1 = Set-up help only
2 = Supervision
3 = Limited assistance
4 = Extensive assistance
5 = Maximal assistance
6 = Total dependence
8 = Activity did not occur

Coding examples

Scenarios for ordinary housework	Coding and rationale
During the observation period, Mr. D was independent with all his own housework. One day, his daughter came for coffee while Mr. D was doing his weekly clean. On leaving the apartment, she noticed a garbage bag at the front door and carried it out to the trash when she left.	**Capacity is coded 0 (Independent) — No help, set-up or supervision needed** Mr. D can do all subtasks of housekeeping and does not require any help with ordinary housework. It was nice of his daughter to take the garbage to the trash, but the help is not needed. Mr. D can compete all the subtasks on his own. **Self-Performance is coded 0 (Independent) — No help, set-up or supervision needed** Mr. D's daughter provided help on this 1 occasion by carrying out the garbage, but Mr. D does not actually require the help to take out the garbage. When someone receives help, it does not necessarily mean they required that help. It is important to use clinical judgment to determine the person's actual self-performance during the observation period.
Mr. D is normally independent with all his own housework. However, during the 3-day observation period, his daughter came and did laundry one morning because he was feeling unwell.	**Capacity is coded 0 (Independent) — No help, set-up or supervision needed** Mr. D can do all subtasks of housekeeping and does not require any help with ordinary housework, including laundry. **Self-Performance is coded 3 (Limited assistance) — Help required on some occasions** Mr. D completed all subtasks of housekeeping except on 1 occasion when his daughter needed to help with laundry. During the observation period, he was able to do ordinary housework independently most of the time, but help was required on 1 occasion.
Mr. D is normally independent with all his own housework. However, on 1 day of the 3-day observation period, his daughter came and did all his housework because Mr. D hurt his ankle and had trouble standing for any length of time. On the other 2 days, Mr. D was able to complete all of the housework on his own.	**Capacity is coded 0 (Independent) — No help, set-up or supervision needed** Mr. D can do all subtasks of housekeeping and does not require any help with ordinary housework. **Self-Performance is coded 3 (Limited assistance) — Help required on some occasions** Mr. D required help with all subtasks of ordinary housework on 1 day of the observation period. For the remainder of the observation period, he was able to complete his housework independently. A code of 3 (Limited assistance) applies if someone can independently complete an IADL some of the time during the observation period but still requires help on some occasions.
During the observation period, Mr. D tidies the apartment, makes his bed every morning, and washes and puts away the dishes every evening. Due to chronic arthritis in his hands, his daughter visits once a week to do his laundry and change his bed linens. His daughter's last weekly visit was 2 days ago.	**Capacity is coded 4 (Extensive assistance) — Help required throughout task but performs 50% or more of task on their own** Mr. D's capacity is coded as extensive assistance because his arthritis limits his ability to complete all subtasks of ordinary housework. He normally completes more than 50% of ordinary housework subtasks independently. **Self-Performance is coded 4 (Extensive assistance) — Help required throughout task but performs 50% or more of task on their own** Mr. D completed more than 50% of ordinary housework subtasks on his own (tidies up every day, makes bed, washes and puts away dishes). Due to his physical limitations, Mr. D required help with laundry and changing the bed linens.

Job Aid

Scenarios for ordinary housework	Coding and rationale
During the first 2 days of the observation period, Mr. D's home health aide helps with ordinary housework, but Mr. D performs more than 50% of the task. On the third day, Mr. D was more tired than usual so was only able to make his bed and his home health aide completed the remaining housework.	**Capacity is coded 4 (Extensive assistance) — Help required throughout task but performs 50% or more of task on their own** Mr. D's capacity is coded as extensive assistance because he normally completes more than 50% of ordinary housework subtasks independently. **Self-performance is coded 5 (Maximal assistance) — Help required throughout task but performs less than 50% of task on their own** During the first 2 days of the observation period, Mr. D completed more than 50% of ordinary housework (extensive assistance). On the last day of the observation period, Mr. D completed less than 50% of the task of ordinary housework (maximal assistance). Since Mr. D had varying levels of assistance during the observation period, code for the most dependent episode, which is maximal assistance.
Normally, a home health aide completes all of Mr. D's housework with the exception of dusting, which Mr. D completes on his own. During the 3-day observation period, Mr. D was sick with the flu, so the home health aide completed the dusting as well.	**Capacity is coded 5 (Maximal assistance) — Help required throughout task but performs less than 50% of task on their own** Mr. D's capacity is coded as maximal assistance because he usually performs less than 50% of ordinary housework subtasks on his own. Mr. D completes the dusting, while the home health aide completes everything else. **Self-performance is coded 6 (Total dependence) — Performance of activity by others during entire period** During the entire observation period, Mr. D required the home health aide to do all of the ordinary housework, as he was sick and unable to complete it himself.

IADL subtasks

These examples of subtasks may be helpful when assessing how the person performs each IADL (G1).
Note: This is not a comprehensive list.

Assessment item	Includes	Excludes	Notes
Meal preparation (G1a)	• Planning meals • Assembling ingredients or meal components (e.g., raw or pre-packaged foods) • Preparing food: washing, cutting, peeling, etc. • Using kitchen appliances: stove, oven, microwave, fridge, freezer, kettle, etc. • Opening food packages, cans or boxes • Setting out utensils and dishes	• Shopping for items • Eating • TPN • Tube feeding • Meals consisting of only take-out	**Do not consider** the nutritional value of the meal.

Job Aid

Assessment item	Includes	Excludes	Notes
Ordinary housework (G1b)	• Loading and unloading dishwasher • Washing, drying and putting away dishes • Making bed, including changing sheets • Dusting • Sweeping, light vacuuming, washing floors • Doing laundry, hanging clothes to dry • Tidying up kitchen, bathroom, bedroom, etc. • Managing garbage	• Spring cleaning and other seasonal housekeeping activities • Scrubbing floors • Moving furniture • Exterior cleaning (e.g., yard maintenance, washing windows)	**Do not consider** the quality of the housework.
Managing finances (G1c)	• Paying bills (e.g., cash, cheque, online, e-transfer, smartphone app, at bank or ATM) • Budgeting household expenses, including small allowances (e.g., pocket money not contributing to major expense) • Monitoring credit card and balancing accounts	• Complex financial transactions (e.g., preparing tax returns) • Assistance needed with transportation to/from bank/ATM	Not applicable
Managing medications (G1d)	• Knowing how to use a blister pack, dosette or pill box/caddy prepared by another • Filling dosette or pill box/caddy • Taking medications as prescribed (e.g., taking correct dosage, opening bottles, applying ointments, giving injections) • Remembering to take medications • Applying creams and managing eyedrops, eardrops, etc. • Filling prescriptions/medications and ordering refills	Not applicable	Not applicable
Phone use (G1e)	• Making a call • Answering a call • Accessing appropriate numbers	• Texting as part of phone use	Not applicable
Stairs (G1f) (full flight)	• Ascending and descending with rests within a flight • Using upright or non-upright position (e.g., crawling/bum-scooting)	• Lifts • Elevators • Ramps	**Code** self-performance as 8 (Activity did not occur) if person completes only half or partial flight of stairs, uses an automated stair lift/elevator, a wheelchair or a ramp, or is carried up/down the stairs.
Shopping (G1g)	• Performing in-store activities • Physically selecting articles in the store from shelf • Paying for items at check-out	• Telephone orders and online shopping delivered to home • Transportation to/from the store • Putting groceries away • Making lists	**Do not consider** what is being purchased.

Assessment item	Includes	Excludes	Notes
Transportation (G1h)	• Navigating public transportation • Calling and arranging for a taxi or Uber/other e-hailing service • Arranging transportation with family or friends • Paying fares • Getting in and out of vehicle • Driving self • Using a bicycle or electric scooter	• Placing mobility aids into vehicle • Putting on a seatbelt • Using a wheelchair	Not applicable

Appendix: Text alternative for figure

If the person needs no help, set-up or supervision, code 0 (Independent). If the person needs set-up help only, code 1 (Set-up help only). If the person needs supervision, oversight or cueing, code 2 (Supervision). If the person needs help on some occasions, code 3 (Limited assistance). If the person needs help but performs 50% or more of the task on their own, code 4 (Extensive assistance). If the person needs help but performs less than 50% of the task on their own, code 5 (Maximal assistance). If the person needs others to complete the full activity, code 6 (Total dependence). If the activity did not occur during the observation period, code 8 (Activity did not occur).

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