



SOURCEWISE MEALS ON WHEELS 3 MONTH TELEPHONE ASSESSMENT FORM

Client ID	Phone
Client Name	Emergency Contact
Emergency Contact 2	Emergency Contact 3

California ADLs/IADLs (Activities of Daily Living and Instrumental Activities of Daily Living)						
Rating Scale	ADLs	Value	IADLs (Part 1)	Value	IADLs (Part 2)	Value
1-Independent	Eating		Light Housework		Manage Medications	
2-Verbal Cueing	Dressing		Shopping/Errands		Money Management	
3-Stand-by Assistance	Transferring in/out of chair		Meal Prep/Cleanup		Heavy Housework	
4-Hands-on Assistance	Bathing		Transportation			
5-Dependent	Toileting		Telephone			
Declined to State	Walking					
	Total		Total		Total	

Notes (including special delivery instructions)

Term Definitions

Activities for Daily Living (ADL)
Eating – (reaching for, picking up, grasping items, manipulating utensils and foods on place, food and beverage to mouth, chewing / swallowing)
Dressing – (putting on & taking off clothes, fastening & unfastening; special devices needed such as back & leg braces, corsets, artificial limbs, or splints)
Transferring in/out of chair – (moving from one sitting or lying position to another, e.g., chair/bed to wheelchair, sofa to standing, repositioning to prevent skin breakdown)
Bathing – (cleaning body using tub, shower, or sponge bath – including getting basin of water, managing faucet, getting in/out of tub or shower, reaching head and body parts for soaping, rinsing & drying)
Toileting – (able to move to/from, on/off, toilet, empty toilet, manage clothing, wipe & clean body after toileting)
Walking – (walking or moving around inside or outside, can respond adequately to uneven surfaces or the presence of obstacles)
Instrumental Activities of Daily Living (IADL)
Light Housework – (light sweeping, wiping countertops and tables, cleaning sinks, storing food and supplies, taking out garbage, dusting and picking up, folding clothes)
Shopping – (compile list, bending, reaching, & lifting, managing cart or basket, identify items needed, transferring items to home, putting them away, phoning in & picking up)
Preparing Food – (planning menus, washing/peeling/slicing vegetables, opening packages/cans/bags, mixing ingredients, lifting pots/pans, re-heating food, cooking, safely operating stove/oven or microwave, washing / drying & putting away dishes)
Transportation – (using private or public vehicles, cars, buses, trains, or other form of transportation to get to medical appointments, shopping, paying bills, etc., able to get to, enter and operate a private vehicle)
Using Telephone – (obtains number, dials, handles receiver, can speak, and hear responses, and terminates call – call 911 or other help)
Medication Management – (physically & mentally able to identify, handle, & consume/inject/insert correctly the amount prescribed)
Managing Money – (physically & mentally handles receipts of monies, expenditures & receipt & payment of bills in a timely and correct manner)
Heavy Housework – (vacuuming, washing floors, cleaning and defrosting refrigerator, cleaning oven and stove, changing bed linen, doing laundry)

Staff Completing Assessment
(Must be a wet signature)

Date

Serving all adults in Santa Clara County

Since 1973

SCN 0058 en (03/24)

■ 3100 De La Cruz Blvd, Suite 310
Santa Clara, CA 95054
P: (408) 350-3200

■ 16340 Monterey Road
Morgan Hill, CA 95037
P: (408) 762-7362

mysourcewise.com

