Appendix F

OAHM Client Impact Evaluation Interview

DRAFT Cohort 2 10/26/2024

Approved OMB Control No: 2528-0335 OMB Expiration Date: 5/31/25

Older Adults Home Modification Program Client Impact Evaluation Interview¹

Study ID			Today's Date	Form Com	pleted By:	
Site ID	Field Team ID	Client ID	Visit	(mm/dd/yyyy)	Name	Job Title
						(dropdown menu: OT,
			□ Paceline			OTA, CAPS, other
	☐ Baseline			[Specify]. Include		
			☐ Follow-Up			Program Manager as
						option in follow-up))

(At baseline) Note: THIS FORM SHOULD ONLY BE COMPLETED BY AN OT/OTA/CAPS.

(Baseline: If client eligibility form is not complete): WARNING: DO NOT ENTER DATA INTO THIS FORM UNTIL YOU HAVE COMPLETED THE CLIENT ELIGIBILITY FORM.

OMB Control No. 2528-2528-0335, expiration date 5/31/2025. This form is designed to provide HUD with information about the effectiveness of its Older Adults Home Modification Grant Program. The information the client provides is voluntary. The client's home can be enrolled in the program whether they decide to participate in the evaluation or not. The public reporting burden for collection of this information is estimated to be 20 minutes per response. HUD may not collect this information, and you are not required to complete this form, unless it displays a currently valid OMB control number.

Grantee Instructions: Conduct this interview <u>only with the client you have enrolled in the OAHM Program, i.e., the beneficiary receiving direct services from your program who has been identified as the client by the licensed <u>occupational therapist (OT)</u>, or a licensed <u>OT Assistant (OTA) or Certified Aging-in-Place Specialist (CAPS) whose work is overseen by a licensed OT.</u> Make sure this client's information has been correctly entered into Item 9 of the Client Eligibility Documentation Form. For each question, do not give "not answered" as an answer choice. Instead, gently probe for answers and only record "not answered" as a last resort.</u>

Section A. INFORMED CONSENT

Read Verbatim: We are evaluating HUD's older adults home modification program to see if HUD can improve it to better meet the needs of clients like you. I would like to read you this form (Show the client the informed consent). This form tells you about the Evaluation and how you can help with it. If you agree to participate in the Evaluation, I will have you sign this form. If you are physically unable to write your name, alternatives to a physical signature will be accepted (If an alternative is provided, please initial and indicate what the alternative is, e.g., adult child signed, spouse signed, etc. directly on the signature page). Taking part in the Evaluation is voluntary. You can choose not to take part in the Evaluation and still receive home modification services through the program.

Go over the Consent Form

A.1 Did the client consent and sign the Form? \square Yes \square No

If A.1=Yes: Read Verbatim: "Now I'll ask you questions about your health and activities. Some of the questions may seem repetitive. We need to ask the same questions in slightly different ways so we can compare our information with national and regional data." *Go to Section B.*

If A.1=No: Read Verbatim: "I'm sorry you chose not to participate in the Evaluation. Thank you for taking the time to meet with me today." End interview and complete Section B of the lost-to-project form, checking the

¹ Code for this document: Black font=Question asked of the client; *Blue italics* = Instruction for the grantee; *yellow highlighted italics*: Instruction for REDCap programmer.

box "Client declined to sign the Informed Consent."

REDCap: Include a button to upload scan of signed informed consent to this form.

Section B: Housing Tenure Questions

Ask these questions only at the baseline visit

	T
B.1 How long have you lived in this home?	Years
Enter number between 0 and 100 or enter -1 if not answered	□ Not answered
(REDCap: Allow decimal places)	2 Tiot anowered
B.1a Thinking about your future years, are you more likely to	☐ Move to a different community
move to a different community, move to a different residence	☐ Move into a different residence within my
within your current community, or stay in your current home	current community
and never move? Check only one (AARP Q5, 2020)	☐ Stay in my current home and never move
	□ Not sure
	☐ Not answered
B.1b How important is it for you to remain in this home for as long	☐ Extremely important
as possible? Check only one (AARP Q8, 2020)	☐ Very important
	☐ Somewhat important
	☐ Not very important
	☐ Not at all important
	□ Not sure
	☐ Not answered
B.1c How important is it for you to be able to live independently	☐ Extremely important
in this home as you age? Check only one (Q11, 2020)	☐ Very important
	☐ Somewhat important
	☐ Not very important
	□ Not at all important
	☐ Not answered

Section C. HEALTH AND UNPLANNED HEALTHCARE USE

Do not provide "not answered" as an answer choice. Please gently try to obtain answers for all questions.

C.1 Would you say that, in general, your health is <i>Check</i>	☐ Excellent
only one (NHATS):	☐ Very good
	□ Good
	☐ Fair
	□ Poor
	□ Not answered
C.2 What in-home healthcare services do you currently	☐ Home visits from Occupational Therapist <i>Do not</i>
receive? Check all that apply	include OAHM Program OT or OTA home visits
	☐ Home visits from Physical Therapist
	☐ Home visits from Nurse
	☐ Home visits from other health care provider
	\square None (If any of the first 4 responses are checked,
	then do not allow "None" or "Not Answered" to be
	checked. Do not allow both "None" and "Not
	answered" to be checked.)
	□ Not answered
C.3 What are some of the main medical issues you	☐ Arthritis

Cancer Heart Disease Difficulty in thinking or remembering things Explain this refers to cognition issues; for example, confusion or memory loss that is happening more often or getting worse, such as forgetting thow to do things you've always done or forgetting things that you would normally know how to do. (CDC) COPD or other chronic respiratory issue Vision issue Open this dropdown list if vision box is checked: Client's wording for vision issue: Dilind legally blind	currently see a doctor for? Do not read answer choices	☐ Diabetes
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explain the scale, i.e., 1=does not interfere,		1 III WEI (DELWECH I UNU 10).
10 Interpress completely		
	20 Interpress completely	

	Alway	Еноа	u ontly	Sometimes	Rarely	Never	Not answered
C.5 How often do you use a:	S	Freq	uently	Sometimes	Kareiy	Never	aliswereu
C.5a Wheelchair to help you move inside			П				
your home and on your property?			_				
C.5b Walker to help you move inside			П				П
your home and on your property?	_		_	_	_	_	_
C.5c Cane to help you move inside your							
home and on your property?	_			_	_	_	
Read Verbatim: "This next set of questions	concern n	najor i	medical	events which	occurre	l betwee	n <mark>[REDCap:</mark>
insert date 12 months prior to baseline or fo							
up visit]. Major medical events are injuries	s or illness	es tha	t happe	n unexpected	lly and ar	e serious	enough that
you need some sort of immediate, unplann	ed medica	ıl care	. Unpla	nned medical	care may	y include	calling 911,
the fire department, or ambulance services		ng an	emerge	ncy room, ur	gent care	facility,	or otherwise
seeking treatment from a healthcare provi							
C.6. In the past year, have you had a major m			1	s <mark>(Go to 6a)</mark>			
requiring you to have unplanned medica	<u>l care calls</u>	10 <u>3</u>		<mark>(Go to Sectio</mark>			
<u>visits</u> ?				t answered <mark>(C</mark>		i <mark>on D)</mark>	
C.6.a. How many of these unplanned me			I .	<mark>Go to Section</mark>			
or visits were due to falls or non-	•		1	$\frac{Go to 6b}{\Box}$ 2	(Go to 6l	<mark>)</mark>	
that happened to you in your ho	me or on	your		Go to 6b)			
property??				r more times <mark>(</mark>			
	1 0 11 ()			t answered (G			`!;
C.6.b. Please list the <u>approximate</u> dates				umber of date			
non-fall injury(ies) occurred. The	month and	l year	r to the number of events specified in C.6.a.) Date 1:				
are sufficient.			Date 2	:			
			Date 3	: Date	: 4:	_	
Section C.7(1): [Number in parentheses shou							
unplanned medical care call or visit. Comple		ck If C	.6=Yes	ana C.6a≥1, u	p to 4 eve	nts. Repl	ace "first" with
"second," "third," and "fourth" as appropr	iate <mark>.</mark>						
Doed Verbation New Lyrill ask you for som	a dataila a	hau++	ha ini				
Read Verbatim: Now I will ask you for some "[INSERT DATE]".	e details a	Dout t	ne mjui	ry <u>III your IIOI</u>	ne or on	<u>your pro</u>	<u>perty</u> on
C.7(1).a. [Number in parentheses should con-	rospond w	ith [□ Yes ((Go to C.7(1).	<u>c)</u>		
call or visit number] For the event on	-			Go to C.7(1).b			
did emergency medical services (for e				answered			
ambulance or the fire department) con			_ 11011	mowered			
home?							
C.7(1).b. Did you GO TO an Emergency Roo	m, Urgent	: [☐ Prim	ary Care Phys	ician or S	pecialist	
Care Center, or Primary Care Physician/S	_			rgency Room			
Check all that apply. For example, if the o	_	to		nt Care Cente	r		
the urgent care and was then sent to ER,			□ No				
urgent care and emergency room. (Rega				answered			
response, go to C.7(1).c)							
C.7(1).c What was the reason for this $[FIRS]$	T] unplan	ned [□ Fall.				
visit? <i>Check all that apply.</i>		[Fall Injury.			
				3urn			
				Cut			
			\square S	Struck by / dro	pped obje	ct (e.g., p	ot or chair,
				oor, cabinet)	_		
			\Box (Other, Please d	lescribe:		

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	□ Not answered
C.7(1).d. Did you spend at least one night in the hospital?	☐ Yes
	\square No (If C.6a>1, go to next unplanned medical event;
	if C.6a=1, go to Section D)
	\square Not answered (If C.6a>1, go to next unplanned
	medical care event; if C.6a=1, go to Section D)
C.7(1).d(i). How many nights were you in the hospital? Enter # of nights between 1 and 250 or enter -1 if not answered. If the person gives their answer in months,	
convert to nights using a conversion factor of 30 days/month.	
C.7(1).d(ii). When you left the hospital, did you stay somewhere other than your current home (e.g., relative's home, rehab facility, nursing home) to recover before returning to your home? If "yes" is answered, ask location. Check only one.	☐ Yes (REDCap: Open dropdown list below. After location is checked go to C.7(1).d.(ii).a.) ☐ Nursing home ☐ Rehabilitation center ☐ Friend or relative's home ☐ Other location. Specify: ☐ No (Go to C.7(1).d(iii)) ☐ Not answered
C.7(1).d(ii).a. How many nights did you stay there? Enter # of nights between 0 and 250 or enter -1 if not answered. If the person gives their answer in months, convert to nights using a conversion factor of 30.42 days/month. REDCap: List an error message if they say 0 nights	
C.7(1).d(iii). How concerned were you about returning to your home after this unplanned major medical event? (If C.6a>1, go to C.6.b for next unplanned event; if C.6a=1, go to Section D)	 □ Extremely concerned □ Very concerned □ Somewhat concerned □ Not very concerned □ Not at all concerned □ Not answered

Section D: EuroQOL (EQ-5D-3L, USA [English] $^{\circ}$ 1998 EuroQol Group EQ-5DTM is a trademark of the EuroQol Group)

Hand the participant PAGE 1 of the of the EQ-5D-3L.

Read Verbatim: "Here are some questions for you to answer. By placing a checkmark in or pointing to one box in each group on the paper, please indicate which statements best describe your own health state <u>today</u>. Then hand the paper back to me." Each time the person tells you or points to an answer, record it below. Only one answer is permitted per question. (Allow only one answer to be checked for each question.)

D.1. Mobility	☐ I have no problems in walking about
	☐ I have some problems in walking about
	☐ I am confined to bed
D.2. Self-Care	☐ I have no problems with self-care
	☐ I have some problems washing or dressing myself.
	☐ I am unable to wash or dress myself
D.3. Usual activities (e.g., work, study, housework, family, or	☐ I have no problems with performing my usual activities
leisure activities)	\square I have some problems with performing my usual activities

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	☐ I am unable to perform my u	sual activities	
D.4. Pain/Discomfort	☐ I have no pain or discomfort		
	☐ I have moderate pain or disco	omfort	
	☐ I have extreme pain or discor	nfort	
D.5. Anxiety/Depression	☐ I am not anxious or depressed		
	\square I am moderately anxious or α	lepressed	
	☐ I am extremely anxious or depressed		
D.6 Hand page 2 of the EQ-5D-3L to the client and read: "We	9		
or bad your health is TODAY. This scale is numbered from			
health you can imagine, 0 means the worst health you can in	•	Score	
[point] on the scale to indicate how your health is today." Th	ne participant can "draw" with a		
finger from the "Your own health state today" box to the point	on the scale. Record this value		
between 0 and 100.			

Section E: Life-Space Assessment (UAB Study of Aging Life-Space Assessment[™] 2008):

Read the frequency choices when asking about each level.

These questions refer to your activities just within the past month							
			Did you need help from another person and/or equipment?				
During the past four weeks,		How often did you get	Both personal assistance and equipment can be selected (Do not allow "no equipment" or "personal assistance" to be selected if				
have you been to	Response	there?	other boxes are selected)				
E.1 Other rooms of your home	E.1A	E.1B	E.1C				
besides the room where you	☐ YES	☐ Less than 1/ week	☐ personal assistance				
sleep?	□ NO	☐ 1-3 times /week	☐ equipment				
		☐ 4-6 times/week ☐ daily	no equipment or personal assistance				
E.2 An area outside your home	E.2A	E.2B	E.2C				
such as your porch, deck or patio,	□ YES	☐ Less than 1/ week	☐ personal assistance				
hallway (of an apartment building) or garage, in your own	□ NO	☐ 1-3 times /week	☐ equipment				
yard or driveway?		☐ 4-6 times/week	\square no equipment or personal				
		☐ daily	assistance				
E.3 Places other than your own	E.3A	E.3B	E.3C				
yard or apartment building, in	☐ YES	☐ Less than 1/ week	☐ personal assistance				
your neighborhood, town, or outside of your town?	□ NO	☐ 1-3 times /week	☐ equipment				
outside of your town.		☐ 4-6 times/week	\square no equipment or personal				
		☐ daily	assistance				

Section F: The Patient Health Questionnaire NHATS

Hand participant answer Card F and read the answer choices before asking the question F.1.

Read Verbatim: "Over the last month, how	Not at	Several	More than	Nearly	Don't	Refused
	all	Days	half the days	Every Day	Know	

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often have you:	(0)	(1)	(2)	(3)	
F.1 Had little interest or little pleasure in doing					
things?					
F.2 Felt down, depressed, or hopeless?					
F.3 Felt nervous, anxious, or on edge?					
F.4 Been unable to stop or control worrying?					

If any of questions F.1 through F.4 were not answered, go back to try to obtain answers to all questions.

Section G: ACTIVITIES OF DAILY LIVING QUESTIONS (US Centers for Medicare and Medicaid, 2020 [https://www.hosonline.org/globalassets/hos-online/survey-instruments/hos 2020 survey English.pdf], National Health and Aging Trends Survey (NHATS), and Retirement Study (HRS))

HAND THE CLIENT CARD G.

Read Verbatim: "The next few questions are about your ability to do everyday activities without help. By help, I mean either the help of another person, including the people who live with you, or the help of special equipment. Do you have any problem..."

	No, I do not		I am unable to	Don't	D.C. I
	have difficulty	difficulty	do this activity	Know	Refused
G.1 Bathing/Showering without help					
G.2 Dressing without help					
G.3 Eating without help					
G.4 Getting in or out of chairs without help					
G.5 Getting in or out of bed without help					
G.6 Using the toilet without help					
G.7 Walking around inside without help					
Read verbatim: "Because of a health problem, o	lo you have any d	difficulty with	the following ac	tivities?"	
(Allow only one answer to be checked for each qu	<mark>ıestion</mark>				
G.8. Pulling or pushing large objects like a					
living room chair or a vacuum					
G.9. Climbing several flights of stairs					

Section H: INSTRUMENTAL ACTIVITIES OF DAILY LIVING² (US Centers for Medicare and Medicaid 2020 [https://www.hosonline.org/globalassets/hos-online/survey-instruments/hos_2020_survey_English.pdf] and National Health and Aging Trends Survey (NHATS)

HAND THE CLIENT CARD H.

Read Verbatim: "Because of a health or physical problem, do you have difficulty doing the following activities?"

	No, I do not have difficulty	Yes, I have difficulty	I don't do this activity	Don't Know	Refused
H.1 Preparing meals					
H.2 Managing money					
H.3 Taking medication as prescribed					
H.4 Doing laundry					
H.5 Doing light housework					
H.6 Shopping for groceries					
H.7 Making telephone calls					

Save and close this form. While still in the home, open and complete the Home Hazard Checklist. Complete section I of this interview after leaving the home.

I.1 Length of the interview in minutes: _____

(REDCap: Questions I.2 through I.5 are optional and should only be included on the baseline form.)

Grantee Guidance: Questions I.1 through I.5 are optional. Answer these questions yourself after you leave the client's home. In general, this information may help other staff determine steps they may need to take when interacting with the client.

I.2 Did the client have frequent difficulty comprehending the questions in the interview (e.g., client had difficulty hearing, concentrating, or required frequent repetition of questions)?	□ No □ Yes
I.2a If yes, please explain	
I.3 Did the client give unusual or irrelevant answers to	□ No
questions (i.e., used wrong response options, made	□ Yes
comments that had nothing to do with the interview question,	
incoherent statements)?	
I.3a If yes, please explain.	
I.4 Did the client have frequent difficulty recalling	□ No
information (i.e., recent events, prior questions, basic	☐ Yes
information about himself/herself such as age or address)?	
I.4a If yes, please explain.	

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Some of the items in this questionnaire were obtained from the Medicare Health Outcomes Survey (HOS) with the express permission of NCQA and the Centers for Medicare &Medicaid Services (CMS). However, this survey is not being used as part of the Medicare HOS program and is not recognized as such by NCQA or CMS.

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I.5 Additional Interviewer Comments	
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CLIENT IMPACT EVALUATION ANSWER CARDS

IMPACT EVALUATION INTERVIEW CARD E

Scale of 1 to 10:

Interfere

IMPACT EVALUATION INTERVIEW ANSWER CARD F

Not at all
Several days
More than half the days
Nearly every day
Don't know

IMPACT EVALUATION INTERVIEW ANSWER CARD G

No, I do not have difficulty
Yes, I have difficulty
I am unable to do this activity
Don't know

IMPACT EVALUATION INTERVIEW ANSWER CARD H

No, I do not have difficulty
Yes, I have difficulty
I don't do this activity
Don't know