Appendix F

REV.OAHMP Client Impact Evaluation Interview (Baseline and Post-Modification)

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 Completed By:						
Site ID	Field Team ID	Client ID	Visit	(mm/dd/yyyy)	Name	Job Title				
			☐ Baseline ☐ Follow-Up			(dropdown menu: OT,				
					□ Pacolino			OTA, CAPS, other		
						[Spec	[Specify]. Include			
					Follow-op	Follow-op	□ Follow-op	□ Follow-op		
						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. 2528-0335, 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, HC-1):	☐ Very good
	□ Good
	☐ Fair
	□ Poor
	☐ Refused/Don't Know
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

currently see a doctor for? Do not read answer choices to the client. Check all that the client mentions.			□ Diabetes □ 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 how 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				
		Visi (Ope Clies le le le le Othe Hea (Ope Clies h d g Clies s s tt Non None None Checked	□ partially deaf □ Other (Specify): □ Speech issue (Open this dropdown list if hearing box is checked: Client's wording for hearing issue: □ stuttering □ stammering □ trouble speaking or talking □ voice problems □ Other (Specify): □ Chronic problems with legs or feet □ Other medical issues (specify): □ None (If any medical issues are checked, then "None" and "Not Answered" should not be checked Do not allow both "None" and "Not answered" to be checked.) □ Not answered				
	Alway					Not	
C 4 How often do you use as	s	Frequently	Sometimes	Rarely	Never	answered	
C.4 How often do you use a: C.4a Wheelchair to help you move inside							
your home and on your property?							
C.4b Walker to help you move inside your home and on your property?							
C.4c Cane to help you move inside your home and on your property?							

Redd Verbatilli. This next set of questions concern major	medical events which occurred between [REDCap:
insert date 12 months prior to baseline or follow-up visit de	ate] and [REDCap: provide date of baseline or follow-
up visit]. Major medical events are injuries or illnesses th	at happen unexpectedly and are serious enough that
you need some sort of immediate, unplanned medical car	re. Unplanned medical care may include calling 911,
the fire department, or ambulance services; or visiting a	n emergency room, urgent care facility, or otherwise
seeking treatment from a healthcare provider."	
C.5. In the past year, have you had a major medical event	\square Yes (Go to 5a)
requiring you to have <u>unplanned medical care calls or</u>	□ No (Go to Section D)
<u>visits</u> ?	☐ Not answered (<i>Go to Section D</i>)
C.5.a. How many of these unplanned medical care calls	\Box 0 (Go to Section D)
or visits were due to falls or non-fall injuries	
that happened to you in your home or on your	
property??	□ 3
	☐ 4 or more times
	☐ Not answered (Go to Section D)
C.5.b. Please list the <u>approximate</u> dates (month and	(The number of dates will open in REDCap according
year are sufficient) and a brief description of the	to the number of events specified in C.5.a.)
most recent or serious events (up to four) that	Date 1: Description:
occurred in your home or on your property within the past 12 months. <i>The description</i>	Date 2: Description:
should uniquely identify each event with its	Date 3: Description:
location, e.g., "Fall in kitchen" or "Injury in	Date 4: Description:
bedroom",	Date 4 Description
C.6 Complete for up to four events identified in C.5b. Pipe i	n the [DESCRIPTION] and [DATE] of each event from
<u>C.5b</u> .	
Read Verbatim: Now I will ask you for some details about	the [DESCRIPTION] on "[INSERT DATE]".
C.6a. For the [DESCRIPTION] on [DATE], did	\square Yes (Go to C.6.c)
emergency medical services (for example, an	\square No (Go to C.6.b)
ambulance or the fire department) come to your	
difficultive of the fire department) come to your	□ Not answered
home?	□ Not answered
home? C.6b. Did you seek treatment from an Emergency Room,	☐ Primary Care Physician or Specialist
home? C.6b. Did you seek treatment from an Emergency Room, Urgent Care Center, or Primary Care	□ Primary Care Physician or Specialist□ Emergency Room
home? C.6b. Did you seek treatment from an Emergency Room,	 □ Primary Care Physician or Specialist □ Emergency Room □ Urgent Care Center
home? C.6b. Did you seek treatment from an Emergency Room, Urgent Care Center, or Primary Care	 □ Primary Care Physician or Specialist □ Emergency Room □ Urgent Care Center □ No
home? C.6b. Did you seek treatment from an Emergency Room, Urgent Care Center, or Primary Care	 □ Primary Care Physician or Specialist □ Emergency Room □ Urgent Care Center □ No □ Not answered
home? C.6b. Did you seek treatment from an Emergency Room, Urgent Care Center, or Primary Care	 □ Primary Care Physician or Specialist □ Emergency Room □ Urgent Care Center □ No □ Not answered (If both C.6a and C.6b are "no" or "not answered" go
home? C.6b. Did you seek treatment from an Emergency Room, Urgent Care Center, or Primary Care Physician/Specialist? Check all that apply.	 □ Primary Care Physician or Specialist □ Emergency Room □ Urgent Care Center □ No □ Not answered (If both C.6a and C.6b are "no" or "not answered" go to next event or section D)
home? C.6b. Did you seek treatment from an Emergency Room, Urgent Care Center, or Primary Care Physician/Specialist? Check all that apply.	 □ Primary Care Physician or Specialist □ Emergency Room □ Urgent Care Center □ No □ Not answered (If both C.6a and C.6b are "no" or "not answered" go to next event or section D) □ Fall
home? C.6b. Did you seek treatment from an Emergency Room, Urgent Care Center, or Primary Care	 □ Primary Care Physician or Specialist □ Emergency Room □ Urgent Care Center □ No □ Not answered (If both C.6a and C.6b are "no" or "not answered" go to next event or section D) □ Fall □ Burn
home? C.6b. Did you seek treatment from an Emergency Room, Urgent Care Center, or Primary Care Physician/Specialist? Check all that apply.	 □ Primary Care Physician or Specialist □ Emergency Room □ Urgent Care Center □ No □ Not answered (If both C.6a and C.6b are "no" or "not answered" go to next event or section D) □ Fall □ Burn □ Cut
home? C.6b. Did you seek treatment from an Emergency Room, Urgent Care Center, or Primary Care Physician/Specialist? Check all that apply.	 □ Primary Care Physician or Specialist □ Emergency Room □ Urgent Care Center □ No □ Not answered (If both C.6a and C.6b are "no" or "not answered" go to next event or section D) □ Fall □ Burn □ Cut □ Struck by / dropped object (e.g., pot or chair, door,
home? C.6b. Did you seek treatment from an Emergency Room, Urgent Care Center, or Primary Care Physician/Specialist? Check all that apply.	 □ Primary Care Physician or Specialist □ Emergency Room □ Urgent Care Center □ No □ Not answered (If both C.6a and C.6b are "no" or "not answered" go to next event or section D) □ Fall □ Burn □ Cut □ Struck by / dropped object (e.g., pot or chair, door, cabinet)
home? C.6b. Did you seek treatment from an Emergency Room, Urgent Care Center, or Primary Care Physician/Specialist? Check all that apply.	 □ Primary Care Physician or Specialist □ Emergency Room □ Urgent Care Center □ No □ Not answered (If both C.6a and C.6b are "no" or "not answered" go to next event or section D) □ Fall □ Burn □ Cut □ Struck by / dropped object (e.g., pot or chair, door, cabinet) □ Other. Please describe:
home? C.6b. Did you seek treatment from an Emergency Room, Urgent Care Center, or Primary Care Physician/Specialist? Check all that apply. C.6c What was the reason for this unplanned medical care call or visit? Check all that apply.	 □ Primary Care Physician or Specialist □ Emergency Room □ Urgent Care Center □ No □ Not answered (If both C.6a and C.6b are "no" or "not answered" go to next event or section D) □ Fall □ Burn □ Cut □ Struck by / dropped object (e.g., pot or chair, door, cabinet) □ Other. Please describe: □ Not answered
home? C.6b. Did you seek treatment from an Emergency Room, Urgent Care Center, or Primary Care Physician/Specialist? Check all that apply.	□ Primary Care Physician or Specialist □ Emergency Room □ Urgent Care Center □ No □ Not answered (If both C.6a and C.6b are "no" or "not answered" go to next event or section D) □ Fall □ Burn □ Cut □ Struck by / dropped object (e.g., pot or chair, door, cabinet) □ Other. Please describe: □ Not answered □ Yes
home? C.6b. Did you seek treatment from an Emergency Room, Urgent Care Center, or Primary Care Physician/Specialist? Check all that apply. C.6c What was the reason for this unplanned medical care call or visit? Check all that apply.	 □ Primary Care Physician or Specialist □ Emergency Room □ Urgent Care Center □ No □ Not answered (If both C.6a and C.6b are "no" or "not answered" go to next event or section D) □ Fall □ Burn □ Cut □ Struck by / dropped object (e.g., pot or chair, door, cabinet) □ Other. Please describe: □ Not answered □ Yes □ No (Go to next event or Section D)
home? C.6b. Did you seek treatment from an Emergency Room, Urgent Care Center, or Primary Care Physician/Specialist? <i>Check all that apply</i> . C.6c What was the reason for this unplanned medical care call or visit? <i>Check all that apply</i> . C.6d. Did you spend at least one night in the hospital?	□ Primary Care Physician or Specialist □ Emergency Room □ Urgent Care Center □ No □ Not answered (If both C.6a and C.6b are "no" or "not answered" go to next event or section D) □ Fall □ Burn □ Cut □ Struck by / dropped object (e.g., pot or chair, door, cabinet) □ Other. Please describe: □ Not answered □ Yes
home? C.6b. Did you seek treatment from an Emergency Room, Urgent Care Center, or Primary Care Physician/Specialist? <i>Check all that apply</i> . C.6c What was the reason for this unplanned medical care call or visit? <i>Check all that apply</i> . C.6d. Did you spend at least one night in the hospital? C.6d.i. How many nights were you in the hospital?	 □ Primary Care Physician or Specialist □ Emergency Room □ Urgent Care Center □ No □ Not answered (If both C.6a and C.6b are "no" or "not answered" go to next event or section D) □ Fall □ Burn □ Cut □ Struck by / dropped object (e.g., pot or chair, door, cabinet) □ Other. Please describe: □ Not answered □ Yes □ No (Go to next event or Section D)
home? C.6b. Did you seek treatment from an Emergency Room, Urgent Care Center, or Primary Care Physician/Specialist? Check all that apply. C.6c What was the reason for this unplanned medical care call or visit? Check all that apply. C.6d. Did you spend at least one night in the hospital? C.6d.i. How many nights were you in the hospital? Enter # of nights between 1 and 250 or enter -	 □ Primary Care Physician or Specialist □ Emergency Room □ Urgent Care Center □ No □ Not answered (If both C.6a and C.6b are "no" or "not answered" go to next event or section D) □ Fall □ Burn □ Cut □ Struck by / dropped object (e.g., pot or chair, door, cabinet) □ Other. Please describe: □ Not answered □ Yes □ No (Go to next event or Section D)
home? C.6b. Did you seek treatment from an Emergency Room, Urgent Care Center, or Primary Care Physician/Specialist? <i>Check all that apply</i> . C.6c What was the reason for this unplanned medical care call or visit? <i>Check all that apply</i> . C.6d. Did you spend at least one night in the hospital? C.6d.i. How many nights were you in the hospital?	 □ Primary Care Physician or Specialist □ Emergency Room □ Urgent Care Center □ No □ Not answered (If both C.6a and C.6b are "no" or "not answered" go to next event or section D) □ Fall □ Burn □ Cut □ Struck by / dropped object (e.g., pot or chair, door, cabinet) □ Other. Please describe: □ Not answered □ Yes □ No (Go to next event or Section D)

C.6d.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?	☐ Yes If "yes", ask" Where did you stay?" Check only one ☐ Nursing home ☐ Rehabilitation center ☐ Friend or relative's home ☐ Other location. Specify: ☐ No (Go to C6d.iv) ☐ Not answered (Go to C6d.iv)
C.6d.iii. How many nights did you stay there? Enter # of nights between 0 and 250. If the person gives their answer in months, convert to nights using a conversion factor of 30.42 days/month.	— □ Not answered
C.6d. iv. How concerned were you about returning to your home? (Go to next event or Section D if this question has been answered for all events)	 □ Extremely concerned □ Very concerned □ Somewhat concerned □ Not very concerned □ Not at all concerned □ Not answered

Section D: EuroQOL (<u>EQ-5D-3L</u>, USA [English] [©]1998 EuroQol Group EQ-5D™ 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 leisure activities)	☐ I have no problems with performing my usual activities ☐ I have some problems with performing my usual activities	
	☐ I am unable to perform my usual activities	
D.4. Pain/Discomfort	☐ I have no pain or discomfort	
	☐ I have moderate pain or discomfort	
	☐ I have extreme pain or discomfort	
D.5. Anxiety/Depression	☐ I am not anxious or depressed	
	☐ I am moderately anxious or depressed	
	☐ I am extremely anxious or depressed	
D.6 Hand page 2 of the EQ-5D-3L to the client and read: "We wor bad your health is TODAY. This scale is numbered from	<u> </u>	
health you can imagine, 0 means the worst health you can in	nagine. Please tell me or Score	
[point] on the scale to indicate how your health is today." The	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.

Those questions refer to your act	ivitiae inet within t	no past month	
These questions refer to your acti	ivities just within t		Did you need help from another person and/or equipment? Both personal assistance and equipment can be selected (Do not allow "no equipment" or "personal
During the past four weeks, have you been to	Response	How often did you get there?	assistance" to be selected if 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	☐ no equipment or personal
		☐ daily	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	☐ no equipment or personal
		☐ daily	assistance

Section F: National Health and Aging Trends Survey (NHATS) Round 12, 2024

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

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

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Section G: MEDICARE HEALTH OUTCOMES SURVEY ACTIVITIES OF DAILY LIVING QUESTIONS² (US Centers for Medicare and Medicaid, 2022,

https://hosonline.org/globalassets/hos-online/hos-m/hosm_dug_plan_2022.pdf)

HAND THE CLIENT CARD C.

Read Verbatim: "For a previous form, you were asked to indicate whether you have any limitations in your daily activities. We are now going to ask a few additional questions in this area."

Read Verbatim: "Because of a health or physical problem, do you have difficulty doing the following activities without special equipment or help from another person?"	No, I do not have difficulty	Yes, I have	I am unable to do this activity	Don't Know / Refused
G.1 Bathing				
G.2 Dressing				
G.3 Eating				
G.4 Getting in or out of chairs				
G.5 Walking				
G.6 Using the toilet				

G.7. Read Verbatim: "The following items are about activities yo	ou might do during a typical day. Does your
health now limit you in these activities? If so, how much?"	(Allow only one answer to be selected for each
question.)	

question.)
 G.7a. Moderate activities, such as moving a table, pushing a vacuum cleaner, bowling, or playing golf ☐ Yes, limited a little ☐ No, not limited at all
G.7b .Climbing several flights of stairs ☐ Yes, limited a lot ☐ Yes, limited a little ☐ No, not limited at all

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Section H: MEDICARE HEALTH OUTCOMES SURVEY INSTRUMENTAL ACTIVITIES OF DAILY

LIVING³ (US Centers for Medicare and Medicaid, 2022,

https://hosonline.org/globalassets/hos-online/hos-m/hosm_dug_plan_2022.pdf)

HAND THE CLIENT CARD D.

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				

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.

Section	I:	Staff	Notes	and	Comments
---------	----	-------	--------------	-----	-----------------

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	□ No
questions in the interview (e.g., client had difficulty hearing,	☐ Yes
concentrating, or required frequent repetition of questions)?	
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.	
I.5 Additional Interviewer Comments	

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Permission received 9/28/2021.

CLIENT IMPACT EVALUATION ANSWER CARDS

IMPACT EVALUATION INTERVIEW ANSWER CARD B

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

IMPACT EVALUATION INTERVIEW ANSWER CARD C

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

IMPACT EVALUATION INTERVIEW ANSWER CARD D

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