



Instructions for Completing the Caregiver Assessment Questionnaire

As required in Senate Bill (SB) 271, the Community Services and Program Operations Section and the Access and Intake/Area Agencies on Aging Section of the Department of Aging and Disability Services (DADS) (now the Health and Human Services Commission (HHSC)) collaborated with the Area Agencies on Aging (AAA) to develop and implement the Caregiver Assessment Questionnaire (CAQ). This mandatory standardized assessment tool was designed to evaluate the needs of certain informal caregivers. The CAQ incorporates a caregiver profile being implemented by LTSS staff throughout Texas.

Background

SB 271, 81st Legislature, Regular Session, 2009, relating to informal caregiver support services, directs DADS/HHSC to:

- raise awareness of services available to informal caregivers (“Caregiver”);
- perform outreach functions to caregivers; and
- gather information about the needs of caregivers through:
 - ▶ collection of profile data on caregivers;
 - ▶ provision of caregiver referral to support services when appropriate; and
 - ▶ implementation of a standardized caregiver assessment tool to evaluate the needs of caregivers.

SB 271 requires DADS/HHSC to use the information collected to refer informal caregivers to available support services and to:

- evaluate the needs of assessed caregivers;
- measure the effectiveness of certain caregiver support interventions;
- improve existing programs;
- develop new services as necessary to sustain caregivers; and
- determine the effect of caregiving on employment and employers.

Requirements

A. Types of Caregivers to be Assessed

The CAQ must be completed for all caregivers receiving Caregiver Support Coordination funded through Title III-E of the Older Americans Act (OAA). For example, Respite Care Vouchers, including Caregiver Respite Institutional Adult Day Care occurs under Caregiver Support Coordination so the completion of the Caregiver Assessment is required for caregivers receiving these services under Title III-E.

B. Standardized Assessment Tool

The CAQ is used to:

- collect various types of data designed to evaluate the needs of informal caregivers;
- collect data in a uniform manner from all AAAs; and
- provide consistent caregiver data to HHSC for evaluation.

The CAQ is designed to meet the requirements of SB 271. The information collected will be analyzed and will be included in HHSC's report to the governor and the Legislative Budget Board. HHSC is required to submit this report in December of each even-numbered year, beginning December 1, 2012.

Completing the Paper Form

The CAQ is required to be completed at intake when Caregiver Support Coordination is identified as a need for a caregiver requesting assistance. The CAQ must be completed for each unduplicated caregiver based on the state fiscal year.

This form may be completed by AAA staff during a face-to-face interview or by telephone. The AAA staff must discuss the questions with the caregiver. **The caregiver may not be requested to complete the form by themselves and return the form to the AAA.**

A. Question Sensitivity

Staff may find it awkward to ask certain questions on the CAQ. While understandable, all questions must be asked and a response recorded for each. **It is not acceptable to skip a question.** If an individual seems resistant to answering any of the questions, **do not insist on a response.** Simply document the individual refused to answer and continue to the next question.

B. Caregiver Employment

Check boxes have been provided as a means to record the ways caregiving responsibilities have affected the caregiver's employment. After asking the open-ended question, staff should listen to the caregiver's comments and check all of the boxes that apply. Interviewers are not expected to read aloud each possible response to the employment question; however, the list can be used as a prompt if the responder is unsure how to answer. If the individual seems uncertain, read aloud the response category headings. For example, "has caregiving affected your employment schedule, pay, leave, performance, or work relationships?" If further clarification is necessary considering asking: "For example, have you had to take extra leave or change your work schedule to meet your caregiver responsibilities?"

C. Caregiver Stress Interview

In this section, check boxes have also been provided as a means to record the level of stress a caregiver may be feeling because of caregiving responsibilities. Engaging in a dialogue with the caregiver can be an effective way to determine the level of stress a caregiver is experiencing for a given area. Ask open-ended questions. Approaching this area in a conversational manner can alleviate discomfort in asking these questions for both the staff and the caregiver.

It is important to keep in mind the most complete and accurate information gained during interviews will help both the caregiver and HHSC. A thorough completion of the CAQ will result in HHSC's best analysis on a statewide level for reporting to the governor and Legislative Budget Board. More importantly, the AAA staff discussion with the caregiver may identify the best ways to help serve the caregiver.

Entering the CAQ Responses into SPURS

Each AAA is required to enter the CAQ responses into SPURS using the assessment function. The assessment document in SPURS mirrors the questions and responses on the paper form. The AAA is not required to complete a paper form if the environment allows for direct entry of the responses into SPURS.