
Functional Assessment in Older Adults

Last updated May 2024

Background

- Evaluating an older patient's functional status can help you determine which activities they need help with and what level of support they need to be safe.
- It's done by asking about basic activities of daily living (ADLs) and instrumental activities of daily living (IADLs) (Katz S et al, JAMA 1963;185:914-919).
- IADLs are advanced skills and are the first activities impacted by dementia, while ADLs are basic skills, often impacted in the moderate and severe stages of dementia.
- I recommend asking about IADLs and ADLs in the presence of a caregiver because patients may minimize or be unaware of their deficits.
- For both ADLs and IADLs, I determine whether patients are independent, require assistance, or are fully dependent on others.
- DEATH-SHAFT is rather morbid mnemonic to help remember them.

Functional Assessment:

- Start with, *"Are you having trouble carrying out day-to-day activities or in your daily routine?" Why?"*
- Instrumental Activities of Daily Living (IADLs)
 - Impairment in IADLs usually points to trouble with higher-order thinking and reasoning. Some losses can happen in older age but multiple impairments can suggest a cognitive disorder.
 - Shopping- *Is there difficulty handling money? How about trouble at the register? Do you have to use shopping lists more? Are you forgetting to buy items you need?*
 - Housekeeping- *Are you having trouble operating the washing machine, dishwasher, or vacuum? Are dirty dishes piling up?*
 - Accounting- *Are you having issues with money management? How about double paying or incurring late-fees? Have you been giving away money or fallen for any scams? Any problems with banking, balancing checkbooks, or creating a budget?*
 - Food preparation- *Have you burned food? Have you left the stove/oven on overnight? Have you left the water running? Have you stopped preparing more complex recipes?*
 - Transportation- *Do you drive? If yes, have you been in any accidents over the past year? How about getting lost on familiar roads? Are you missing stop signs/stop lights?*
 - Additional- Inquire about difficulty using computers, cell phones, electronics, and medications. For meds, query, *"Do you forget to take your meds? Have you had to start using a pill box? Does anyone help you with them?"*
- Basic Activities of Daily Living (ADLs)
 - Basic ADLs focus more on physical functions. Often, these begin to decline in the later stages of dementia. Caregivers are more attuned to these deficits than patients are and should also be asked about them. Issues with falls, choking, or incontinence should be referred to the patient's primary care clinician, as further assessment is usually required.
 - Dressing- *Do you have trouble getting dressed? Have you worn clothes inside out or had trouble with buttons?*
 - Eating- *Is there increased craving for sweets or carbs?* This may be seen in the early stages of frontotemporal dementia. *Is there any trouble cutting food, using forks/knives/spoons, eating, or swallowing?*
 - Ambulating- *How many falls have there been in the last 6 months? What caused them?*
 - Toileting- *Any bathroom accidents? Have you started wearing adult underwear?*

- o Hygiene- *How often are you bathing?* Many older adults with dementia become resistant to showering. *Is there difficulty with using hot/cold knobs or applying soap? How about with brushing your teeth or combing your hair?*

DEATH and SHAFT Mnemonics With Sample Questions	
ADLs ¹	IADLs ¹
Dressing <ul style="list-style-type: none"> • Have you needed help getting dressed? 	Shopping <ul style="list-style-type: none"> • How do you go about shopping for groceries and personal items? • Have you had trouble handling money or credit cards?
Eating <ul style="list-style-type: none"> • Do you need assistance with consuming your meals? 	Housekeeping <ul style="list-style-type: none"> • Are you having trouble keeping your living area clean? • Do you experience any difficulty with operating the dishwasher or doing the laundry?
Ambulating <ul style="list-style-type: none"> • Do you experience trouble getting out of bed or a chair? • How many falls have you had in the past few months? 	Accounting <ul style="list-style-type: none"> • How do you keep up with finances and bills?
Toileting <ul style="list-style-type: none"> • Do you have difficulty getting to the bathroom in time? Have you had accidents? 	Food Preparation <ul style="list-style-type: none"> • How do you manage your meals? Do you cook yourself? • Have you burned food or left the stove/oven running?
Hygiene <ul style="list-style-type: none"> • Do you need assistance bathing? • Do you need help combing your hair or brushing your teeth? 	Transportation <ul style="list-style-type: none"> • Have you gotten lost while driving? • Have you been in any accidents in the last year?

¹Source: Bickley LS. Bates' Guide to Physical Examination and History Taking. 12th ed. Alphen aan den Rijn, The Netherlands: Wolters Kluwer; 2017.