Minimum Data Set (MDS) 3.0
Instructor Guide

Section F
Preferences for Customary Routine & Activities

Objectives

- State the intent of Section F Preferences for Customary Routine and Activities.
- Identify the two methods for conducting the assessment for customary routine and activities.
- Describe how to conduct an assessment of a resident's customary routine and activities.
- Code Section F correctly and accurately.

Methodology

This lesson uses lecture, video, and scenario-based practice.

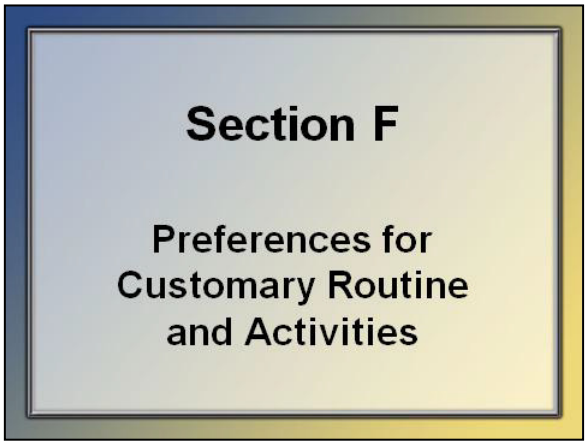
Training Resources

- Instructor Guide
- Slides 1 – 47
- Section F video

Instructor Preparation

- Review the Instructor Guide.
- Review the learning objectives for the lesson.
- Rehearse with slide presentation.

SLIDES	INSTRUCTIONAL GUIDANCE



Slide 1

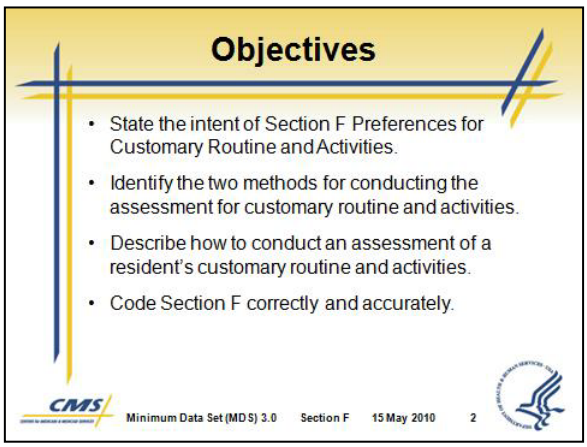
I. Introduction/ Objectives

A. Introduction

This lesson addresses Section F Preferences for Customary Routine and Activities.

Quality of life can be greatly enhanced when care respects the resident's choice regarding anything that is important to the resident.

The intent of the items in this section is to obtain information regarding the resident's preferences for his or her daily routine and activities.



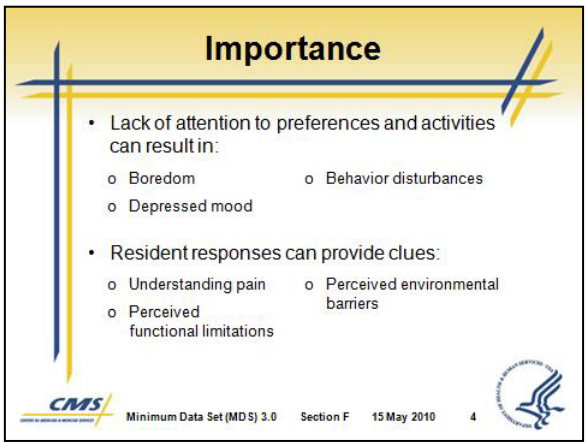
Slide 2

B. Objectives

- State the intent of Section F Preferences for Customary Routine and Activities.
- Identify the two methods for conducting the assessment for customary routine and activities.
- Describe how to conduct an assessment of a resident's customary routine and activities.
- Code Section F correctly and accurately.

SLIDES	INSTRUCTIONAL GUIDANCE

Slide 3



Slide 4

II. Importance of Assessment

A. Nursing home residents are individuals with distinct lifestyle preferences.

B. Activities are a way for individuals to establish meaning in their lives, and the need for enjoyable activities and pastimes does not change on admission to a nursing facility.

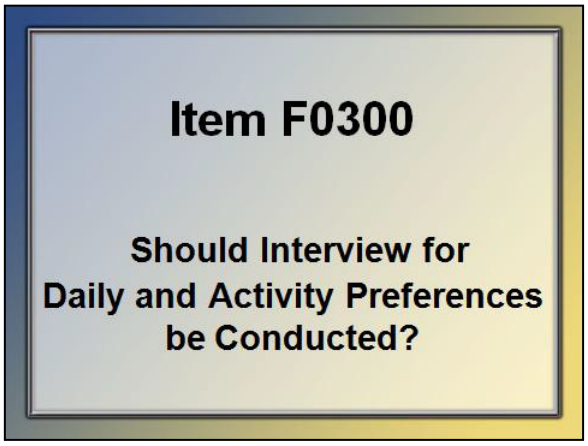
C. A lack of attention to lifestyle preferences or a lack of opportunity to engage in meaningful and enjoyable activities can result in:

1. Boredom
2. Depressed mood
3. Behavior disturbances

D. Resident responses (particularly that they cannot do something or have no choice) can provide clues for the following issues

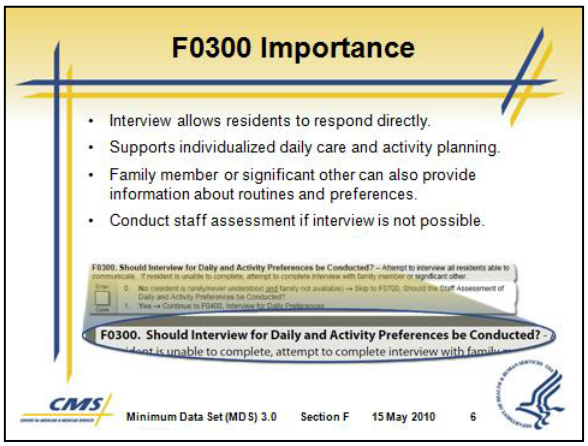
1. Understanding pain
2. Perceived functional limitations
3. Perceived environmental barriers

SLIDES	INSTRUCTIONAL GUIDANCE



Slide 5

III. F0300 Should Interview for Daily and Activity Preferences Be Conducted?

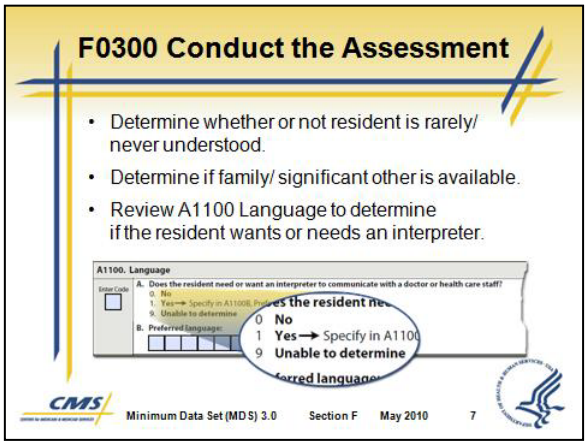


Slide 6

A. F0300 Importance

1. MDS Section F can be completed either by a resident interview or by a staff assessment.
   a. The interview option allows residents to respond directly to questions concerning their daily routine and preferred activities.
   b. Information about preferences that comes directly from the resident provides specific information for individualized daily care and activity planning.
   c. If the resident cannot complete the interview, try to interview a family member or significant other who is knowledgeable about the resident's routine and preferences.
   d. If an interview is not possible, conduct the staff assessment.

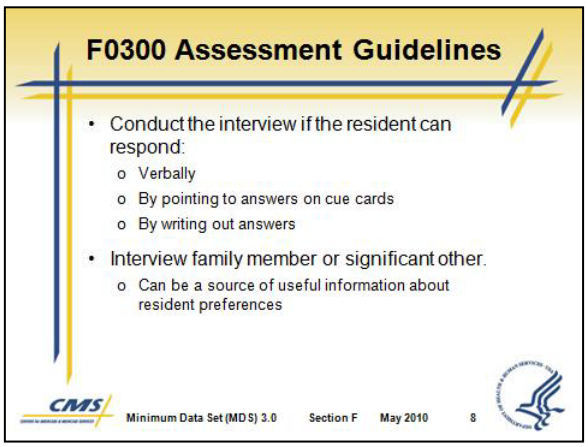
SLIDES	INSTRUCTIONAL GUIDANCE



Slide 7

B. F0300 Conduct the Assessment

1. The assessment for this item is similar as for other interview-based sections.
2. Determine whether or not resident is rarely/never understood.
3. Determine if family/ significant other is available.
4. Review A1100 Language to determine if the resident wants or needs an interpreter.
   a. Check if A1100 is coded as **1**.
5. Conduct the interview if the resident can respond:
   a. Verbally
   b. By pointing to answers on a cue card
   c. By writing out his or her answers

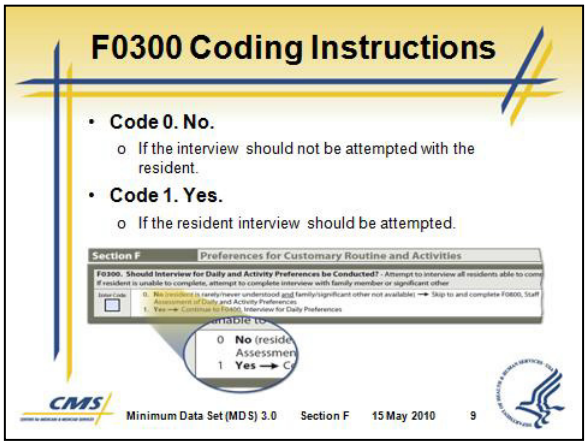


Slide 8

C. F0300 Assessment Guidelines

1. An interview should be conducted if the resident can respond:
   a. Verbally
   b. By pointing to answers on a cue card
   c. By writing out answers
2. If the resident cannot complete the interview, interview a family member or significant other.
   a. Can provide useful information about resident preferences

SLIDES	INSTRUCTIONAL GUIDANCE



Slide 9

D. F0300 Coding Instructions

1. Code this item to record whether the resident preference interview should be attempted.

- **Code 0. No**

  If the interview should not be attempted with the resident

  This option should be selected for residents who:

  – Are rarely/ never understood

  – Need an interpreter but one was not available

  – Do not have a family member or significant other available for interview

  Skip to F0800 Staff Assessment of Daily and Activity Preferences.

Emphasize skip pattern here.

- **Code 1. Yes**

  If the resident interview should be attempted

  This option should be selected for residents who are:

  – Able to be understood

  – For whom an interpreter is not needed or is present

  OR

SLIDES	INSTRUCTIONAL GUIDANCE

– Who have a family member or significant other available for interview

Continue to F0400 Interview for Daily Preferences and F0500 Interview for Activity Preferences.

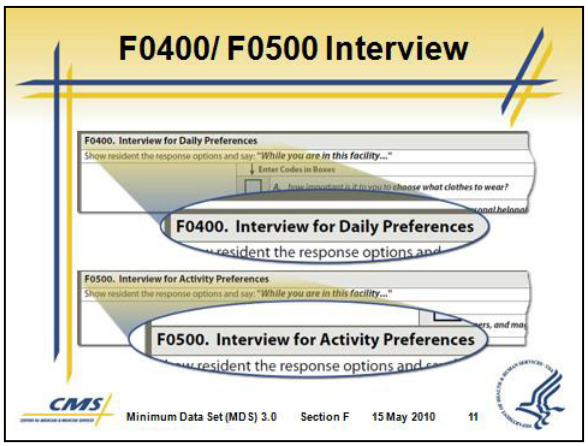
Slide 10

IV. F0400 Interview for Daily Preferences/ F0500 Interview for Activity Preferences

A. Conduct an interview if at all possible to determine the resident's current preference for daily routine and activities.

B. Incorporating resident preferences into care planning is a dynamic, collaborative process.

C. Because residents may adjust their preferences in response to events and changes in status, the preference assessment is intended as a first step in an ongoing dialogue between care providers and the residents.

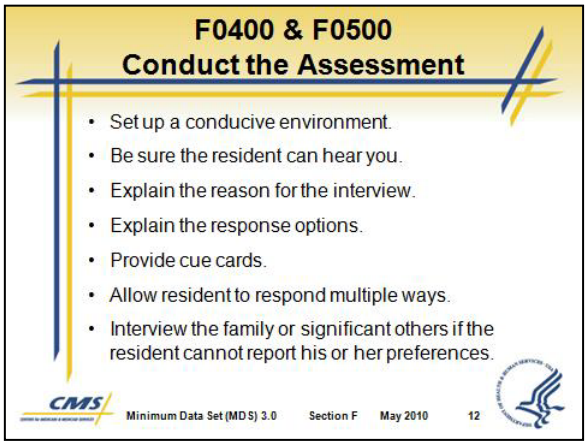


Slide 11

D. F0400/ F0500 Interview

1. The information obtained during this interview is just a portion of the assessment.
2. Nursing homes should use this as a guide to create an individualized plan based on the resident's preferences.
3. The interview is not meant to be all-inclusive.

SLIDES	INSTRUCTIONAL GUIDANCE



Slide 12

E. F0400 & F0500 Conduct the Assessment

1. Conduct this interview similar to other interviews.
2. Make sure the environment is conducive to conducting the interview.
   - Environment
   - Positioning
   - Cue cards
3. Make sure the resident can hear you.
   a. Residents with hearing impairment should be interviewed using their usual communication devices/techniques, as applicable.
   b. Try an external assistive device (headphones or hearing amplifier) if you have any doubt about hearing ability.
   c. Minimize background noise.
4. Explain the reason for the interview.

Instructor Notes

Notes

Suggested language for explaining the reason for the interview

"I'd like to ask you a few questions about your daily routines.

The reason I'm asking you these questions is that the staff here would like to know what's important to you.

This helps us plan your care around your preferences so that you can have a comfortable stay with us.

Even if you're only going to be here for a few days, we want to make your stay is as personal as possible."

Notes

Instructor Notes

SLIDES	INSTRUCTIONAL GUIDANCE

5. Explain the interview response choices.
   - **Very important**
   - **Somewhat important**
   - **Not very important**
   - **Not important at all**
   - **Important, but can't do or no choice**

Instructor Notes

Notes

Suggested language for the response choices

"I am going to ask you how important various activities and routines are to you while you are in this facility."

"I will ask you to answer using the choices you see on this card (Say while pointing to cue card): 'Very important,' 'Somewhat important,' 'Not very important,' or 'Not important at all.'"

Notes

Instructor Notes

6. Explain the "Important, but can't do or no choice" option.
   a. This option should be selected if the resident or family/ significant other indicates:
      - A topic is "Important"
      - But that he or she is physically unable to participate or has no choice about participating while staying in facility
      - Because of facility resources or scheduling

SLIDES	INSTRUCTIONAL GUIDANCE

Instructor Notes

Notes

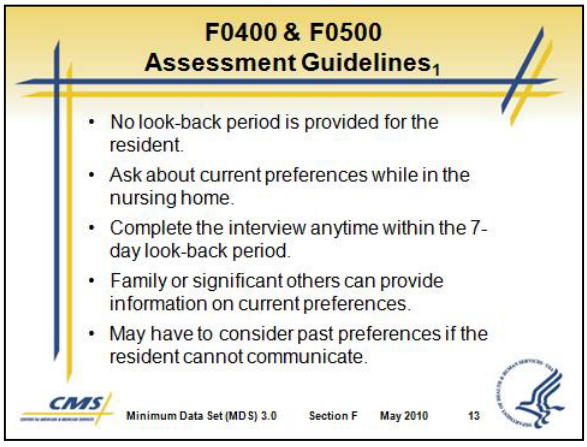
Suggested language for the "Important, but can't do or no choice option"

- "Let me explain the 'Important, But Can't Do or No Choice' answer."
- "You can select this answer if something would be important to you, but because of your health or because of what's available in this facility, you might not be able to do it."
- "So, if I ask you about something that is important to you, but you don't think you're able to do it now, answer 'Important, But Can't Do or No Choice.'"
- "If you choose this option, it will help us to think about ways we might be able to help you do those things."

Notes

Instructor Notes

7. Demonstrate cue cards or a written list of response options to use during the interview.
8. Offer multiple ways for a resident to respond to the interview questions.
   a. Verbally.
   b. Point to answers on a cue card.
   c. Write out an answer.

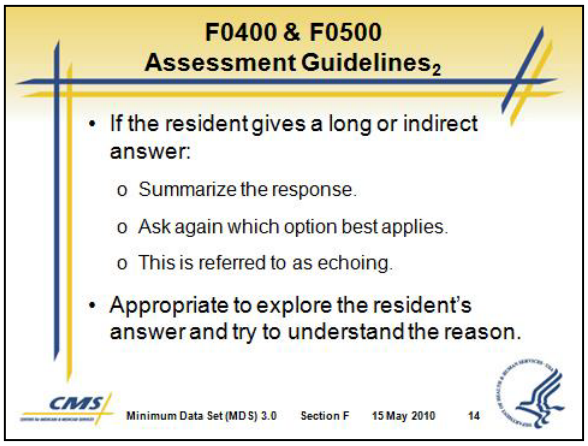


Slide 13

F. F0400 & F0500 Assessment Guidelines

1. No look back period is set for the resident for this assessment.
2. Ask about current preferences while in the nursing home.
3. Complete the interview within the 7-day look-back period.
4. Family or a significant other can provide information about current preferences.

SLIDES	INSTRUCTIONAL GUIDANCE



Slide 14

5. Focus on current preferences but may also consider past preferences if the resident cannot communicate.
6. Residents may give long or indirect answers to interview items.
7. To narrow the answer to the response choices available, it can be useful to:
   a. Summarize their longer answer.
   b. Then ask which response option best applies.
8. This technique is known as echoing.
9. For the questions in Section F, it is appropriate to explore a resident's answer and try to understand the reason.

Instructor Notes

Notes

F0400 Interview Questions

A. how important is it to you to **choose what clothes to wear?**
B. how important is it to you to **take care of your personal belongings or things?**
C. how important is it to you to **choose between a tub bath, shower, bed bath, or sponge bath?**
D. how important is it to you to **have snacks available between meals?**
E. how important is it to you to **choose your own bedtime?**
F. how important is it to you to **have your family or a close friend involved in discussions about your care?**
G. how important is it to you to be able **to use the phone in private?**
H. how important is it to you to **have a place to lock your things to keep them safe?**

Notes

Instructor Notes

SLIDES	INSTRUCTIONAL GUIDANCE

Instructor Notes

Notes

F0500 Interview Questions

A. how important is it to you to **have books, newspapers, and magazines to read?**

B. how important is it to you to **listen to music you like?**

C. how important is it to you to **be around animals such as pets?**

D. how important is it to you to **keep up with the news?**

E. how important is it to you to **do things with groups of people?**

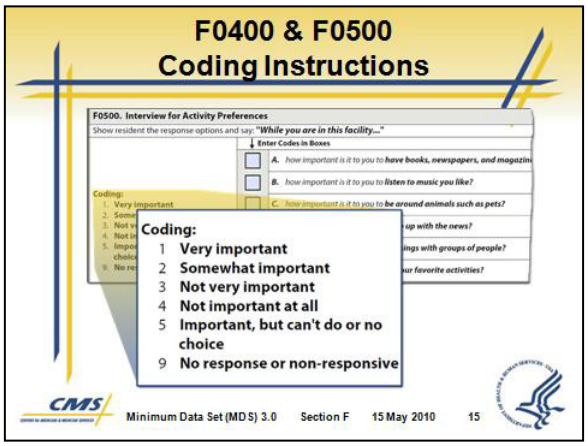
F. how important is it to you to **do your favorite activities?**

G. how important is it to you to **go outside to get fresh air when the weather is good?**

H. how important is it to you to **participate in religious services or practices?**

Notes

Instructor Notes



Slide 15

G. F0400 & F0500 Coding Instructions

1. F0400 and F0500 use the same response options for each set of interview items.

- **Code 1. Very important**

  If resident, family, or significant other indicates that the topic is "Very important"

- **Code 2. Somewhat important**

  If resident, family, or significant other indicates that the topic is "Somewhat important"

- **Code 3. Not very important**

  If resident, family, or significant other indicates that the topic is "Not very important"

SLIDES	INSTRUCTIONAL GUIDANCE

- **Code 4. Not important at all**

  If resident, family, or significant other indicates that the topic is "Not important at all"

- **Code 5. Important but can't do or no choice**

  If resident, family, or significant other indicates that the topic is "Important," but that he or she is physically unable to participate, or has no choice about participating while staying in nursing home because of nursing home resources or scheduling

- **Code 9. No response or non-responsive**
  - If resident, family, or significant other refuses to answer or says he or she doesn't know
  - If resident does not give an answer to the question for several seconds and does not appear to be formulating an answer
  - If resident provides an incoherent or nonsensical answer that does not correspond to the question

SLIDES	INSTRUCTIONAL GUIDANCE
 Slide 16	H. Section F Video 1. Play section F Preferences video.

Instructor Notes

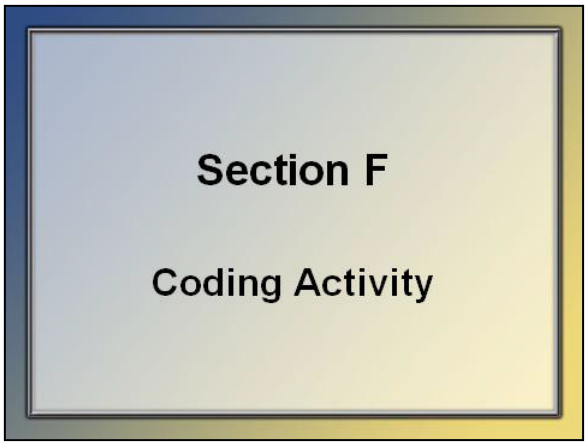
Notes

Section F Coding Activity Instructions

- Review each MDS Section F interview scenario.
- Ask participants to choose the best response option for the scenario.
- Give all participants time to respond.
- Review participant responses.

Notes

Instructor Notes

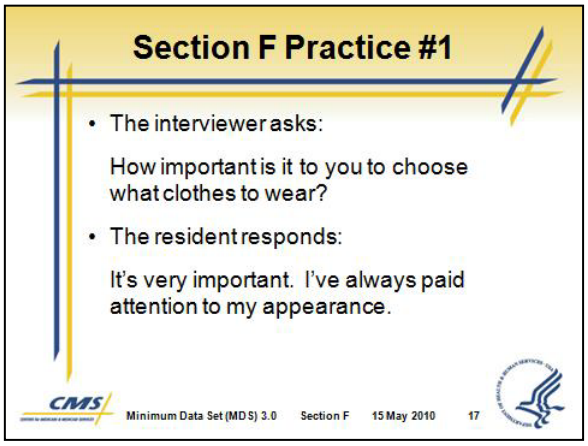


Slide 17

V. Section F Coding Activity

Activity includes 6 examples

SLIDES	INSTRUCTIONAL GUIDANCE



Slide 18

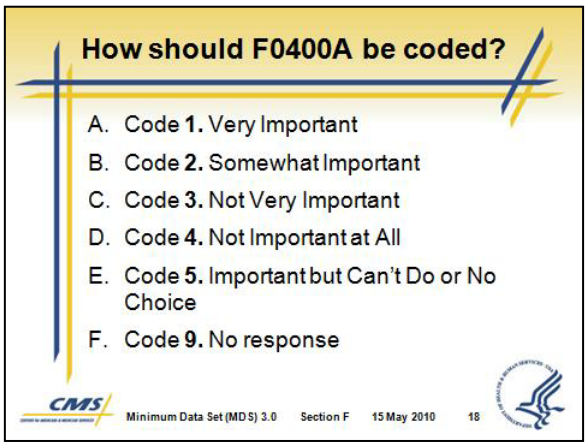
A. Section F Practice #1

1. The interviewer asks:

   How important is it to you to choose what clothes to wear?

2. The resident responds:

   It's very important. I've always paid attention to my appearance.



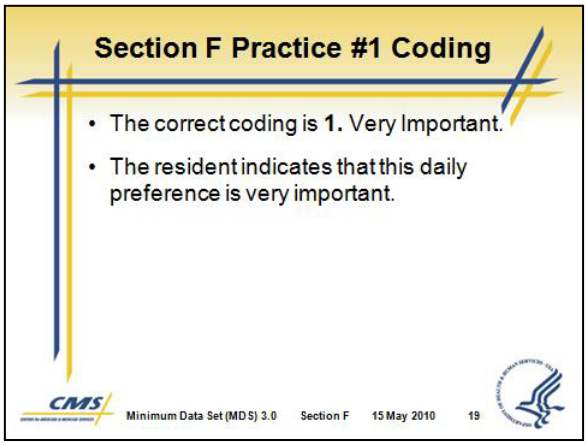
Slide 19

3. How should F0400A be coded?

   Direct participants to refer to item F0400 in the MDS instrument.

   Give participants time to answer the question.

   a. Correct answer is A. Code **1.** Very Important.



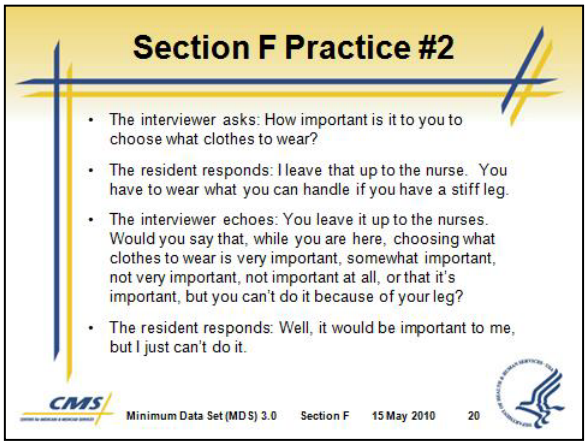
Slide 20

4. Section F Practice #1 Coding

   a. The correct coding is **1.** Very Important.

   b. The resident indicates that this daily preference is very important.

SLIDES	INSTRUCTIONAL GUIDANCE



Slide 21

B. Section F Practice #2

1. The interviewer asks:

   How important is it to you to choose what clothes to wear?

2. The resident responds:

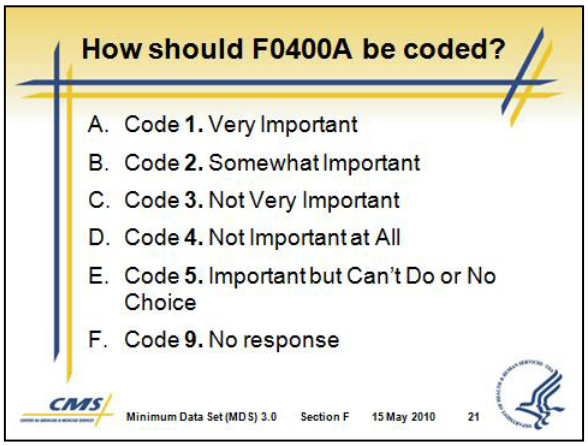
   I leave that up to the nurse. You have to wear what you can handle if you have a stiff leg.

3. The interviewer echoes:

   You leave it up to the nurses. Would you say that, while you are here, choosing what clothes to wear is [pointing to cue card] very important, somewhat important, not very important, not important at all, or that it's important, but you can't do it because of your leg?

4. The resident responds:

   Well, it would be important to me, but I just can't do it.



Slide 22

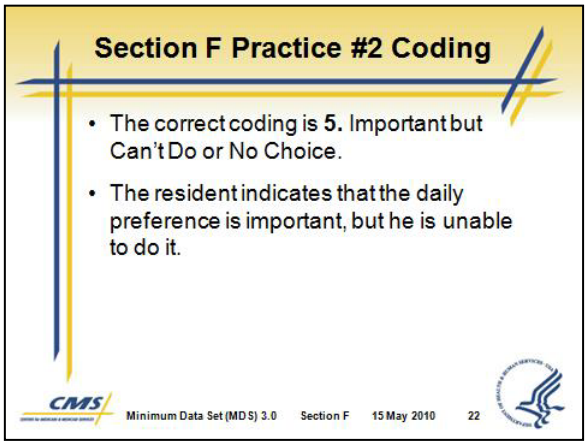
5. How should F0400A be coded?

   Direct participants to refer to item F0400 in the MDS instrument.

   Give participants time to answer the question.

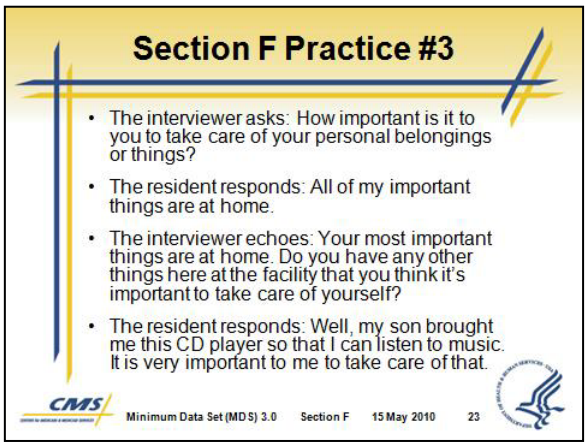
   a. Correct answer is E. Code **5.** Important but Can't Do or No Choice.

SLIDES	INSTRUCTIONAL GUIDANCE



Slide 23

6. Section F Practice #2 Coding
   a. The correct coding is **5.** Important but Can't Do or No Choice.
   b. The resident indicates that the daily preference is important but unable to do it.



Slide 24

C. Section F Practice #3

1. The interviewer asks:

   How important is it to you to take care of your personal belongings or things?

2. The resident responds:

   All of my important things are at home.

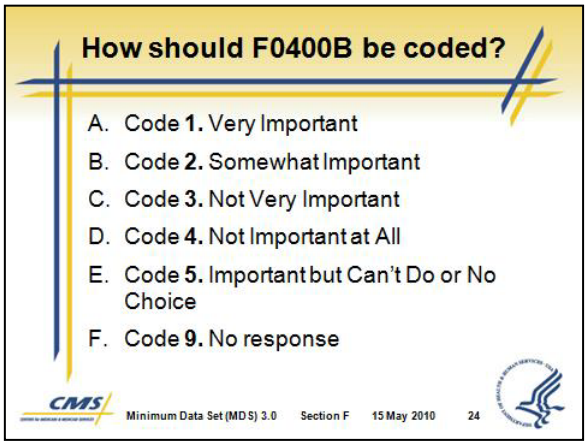
3. The interviewer echoes:

   Your most important things are at home. Do you have any other things here at the facility that you think it's important to take care of yourself?

4. The resident responds:

   Well, my son brought me this CD player so that I can listen to music. It is very important to me to take care of that.

SLIDES	INSTRUCTIONAL GUIDANCE



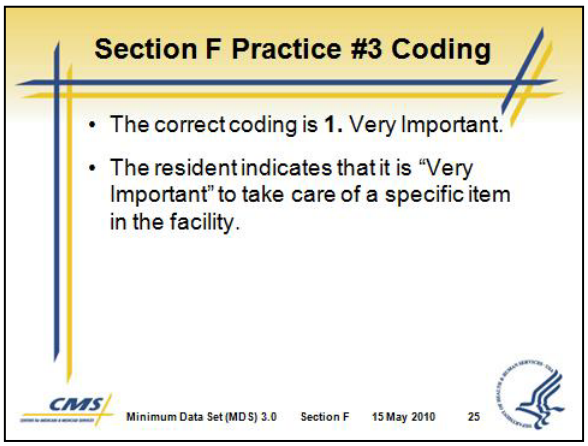
Slide 25

5. How should F0400B be coded?

Direct participants to refer to item F0400 in the MDS instrument.

Give participants time to answer the question.

a. Correct answer is A. Code **1.** Very Important.

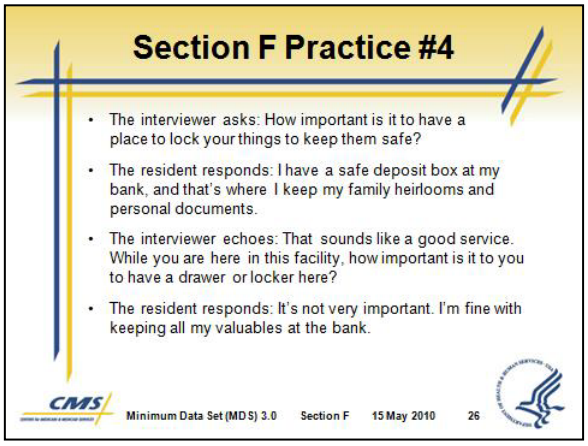


Slide 26

6. Section F Practice #3 Coding

a. The correct coding is **1.** Very Important.

b. The resident indicates that it is "Very Important" to take care of a specific item in the facility.



Slide 27

D. Section F Practice #4

1. The interviewer asks:

How important is it to have a place to lock your things to keep them safe?

2. The resident responds:

I have a safe deposit box at my bank, and that's where I keep my family heirlooms and personal documents.

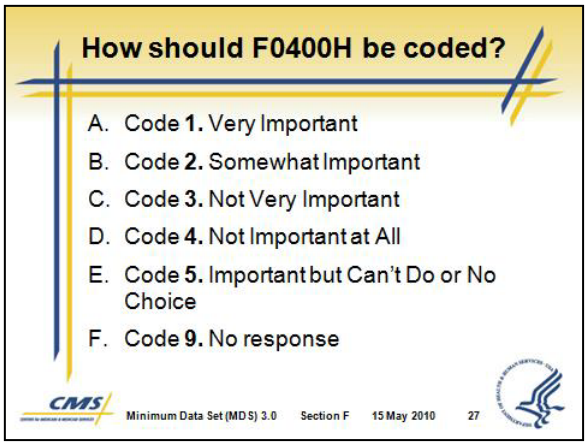
3. The interviewer echoes:

That sounds like a good service. While you are here in this facility, how important is it to you to have a drawer or locker here?

SLIDES	INSTRUCTIONAL GUIDANCE

4. The resident responds:

It's not very important. I'm fine with keeping all my valuables at the bank.



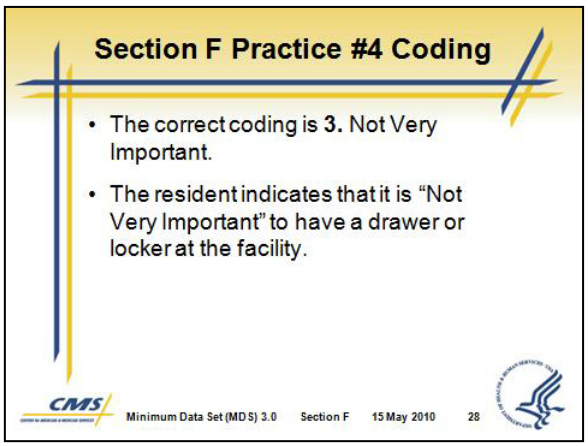
Slide 28

5. How should F0400H be coded?

Direct participants to refer to item F0400 in the MDS instrument.

Give participants time to answer the question.

a. Correct answer is C. Code **3.** Not Very Important.

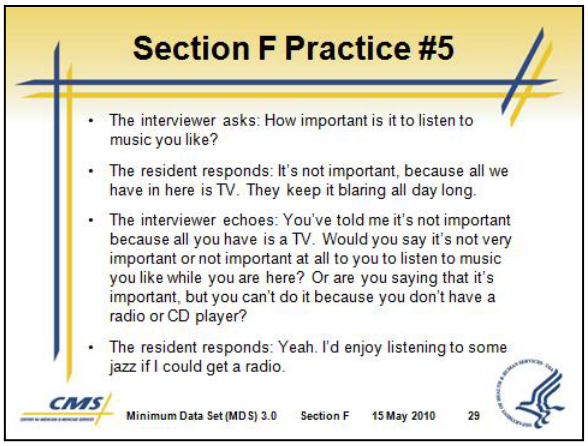


Slide 29

6. Section F #4 Coding

a. The correct coding is **3.** Not Very Important.

b. The resident indicates that it is "Not Very Important" to have a drawer or locker at the facility.



Slide 30

E. Section F Practice #5

1. The interviewer asks:

How important is it to listen to music you like?

2. The resident responds:

It's not important, because all we have in here is TV. They keep it blaring all day long.

SLIDES	INSTRUCTIONAL GUIDANCE

3. The interviewer echoes:

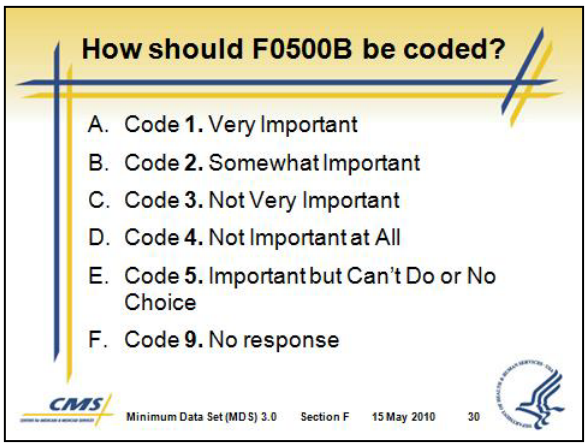
You've told me it's not important because all you have is a TV.

Would you say it's not very important or not important at all to you to listen to music you like while you are here?

Or are you saying that it's important, but you can't do it because you don't have a radio or CD player?

4. The resident responds:

Yeah. I'd enjoy listening to some jazz if I could get a radio.



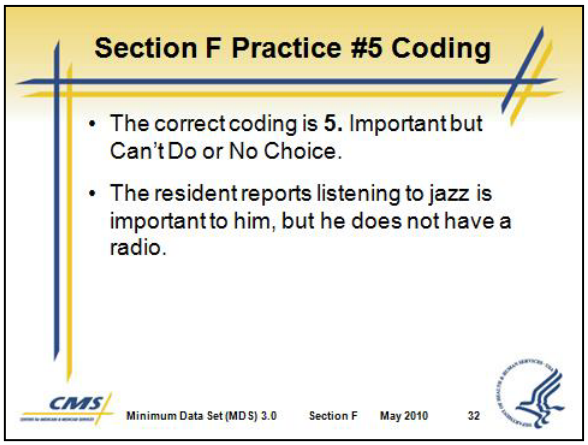
Slide 31

5. How should F0500B be coded?

Direct participants to refer to item F0400 in the MDS instrument.

Give participants time to answer the question.

a. Correct answer is E. Code **5.** Important but Can't Do or No Choice.



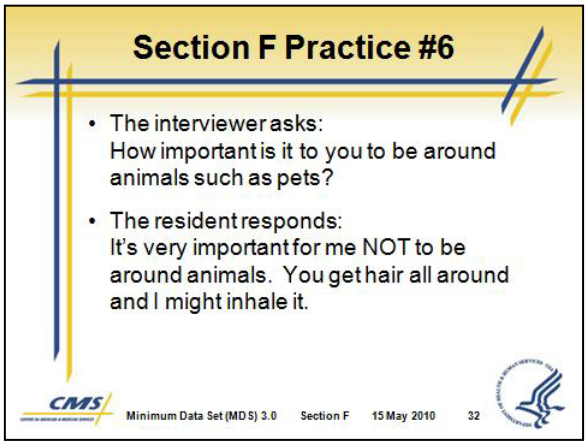
Slide 32

6. Section F Practice #5 Coding

a. The correct coding is **5.** Important but Can't Do or No Choice.

b. The resident reports listening to jazz is important to him, but he does not have a radio.

SLIDES	INSTRUCTIONAL GUIDANCE



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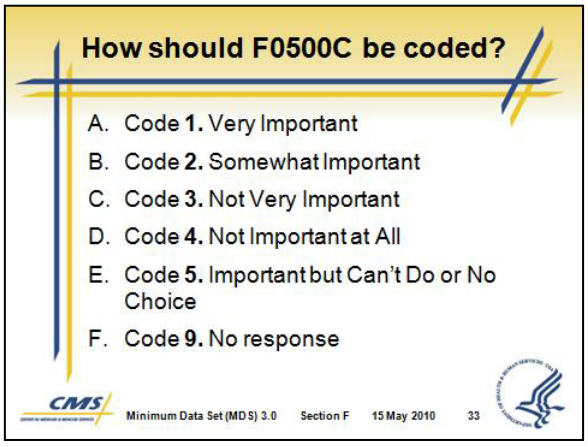
F. Section F Practice #6

1. The interviewer asks:

How important is it to you to be around animals such as pets?

2. The resident responds:

It's very important for me NOT to be around animals. You get hair all around, and I might inhale it.



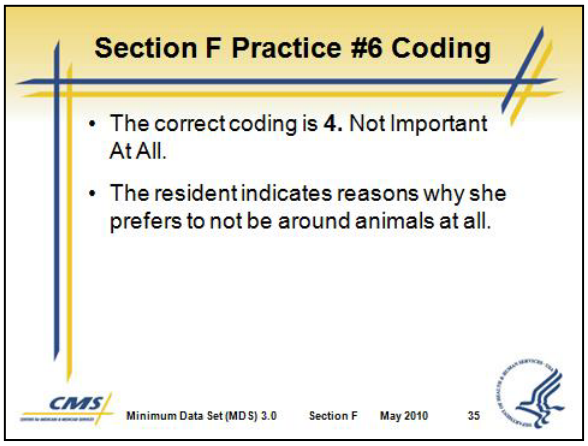
Slide 34

3. How should F0500C be coded?

Direct participants to refer to item F0400 in the MDS instrument.

Give participants time to answer the question.

a. Correct answer is D. Code **4.** Not Important At All.



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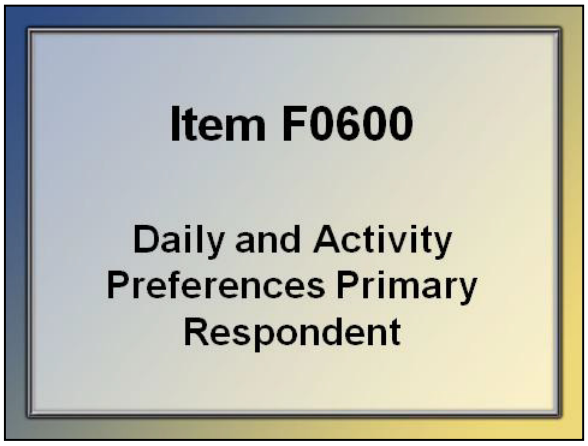
4. Section F Practice #6 Coding

a. The correct coding is **4.** Not Important At All.

b. The resident indicates reasons why she prefers to not be around animals at all.

SLIDES	INSTRUCTIONAL GUIDANCE



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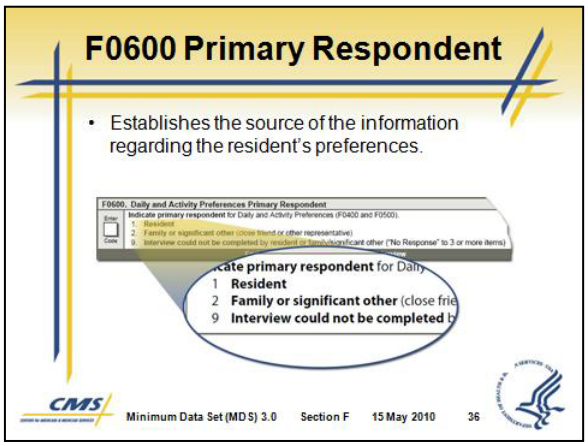
VI. Item F0600 Daily and Activities Preferences Primary Respondent



Slide 37

A. This item establishes the source of the information regarding the resident's preferences.

B. F0600 Coding Instructions

- **Code 1. Resident**

  If resident was the primary source for the preference questions in F0400 and F0500

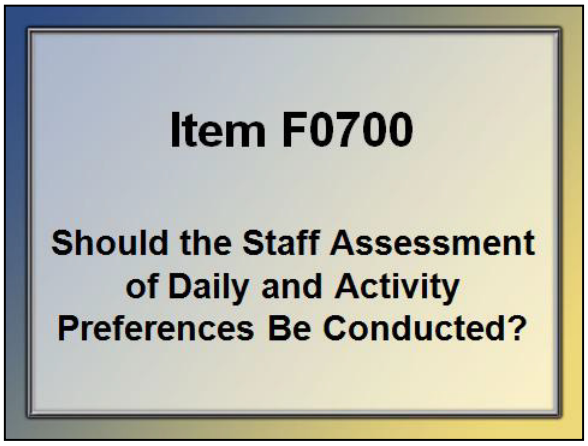
- **Code 2. Family or significant other**

  If a family member or significant other was the primary source of information for F0400 and F0500

- **Code 9. Interview could not be completed**

  If F0400 and F0500 could not be completed by the resident, a family member, or a representative of the resident

SLIDES	INSTRUCTIONAL GUIDANCE



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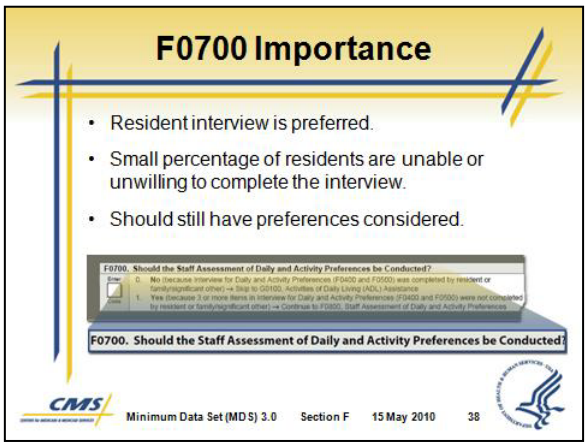
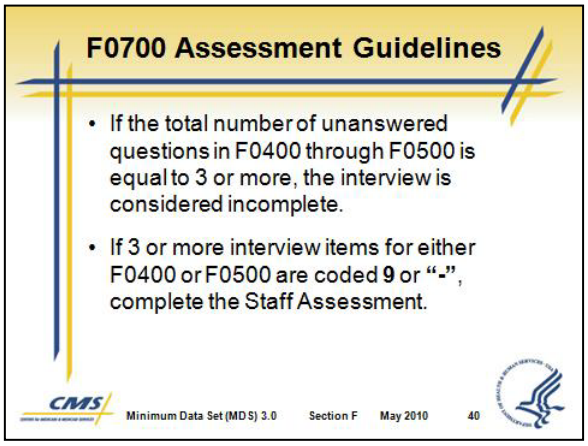
VII. F0700 Should the Staff Assessment of Daily and Activity Preferences be Conducted?



Slide 39

A. FO700 Importance

1. Resident interview is preferred as it most accurately reflects what the resident views as important.
2. However, a small percentage of residents are unable or unwilling to complete the interview for Daily and Activity Preferences.
3. Persons unable to complete the preference interview should still have preferences evaluated and considered.



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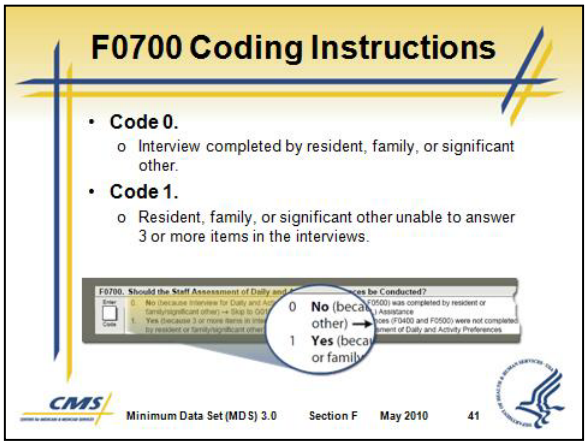
B. F0700 Assessment Guidelines

1. If the total number of unanswered questions in F0400 through F0500 is equal to 3 or more, the interview is considered incomplete.
2. If 3 or more interview items for either F0400 Interview for Daily Preferences or F0500 Interview for Activity Preferences are coded **9** or **"-"**, complete the Staff Assessment.

SLIDES	INSTRUCTIONAL GUIDANCE



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C. F0700 Coding Instructions

1. Indicate if the staff assessment should be completed.

- **Code 0. No**

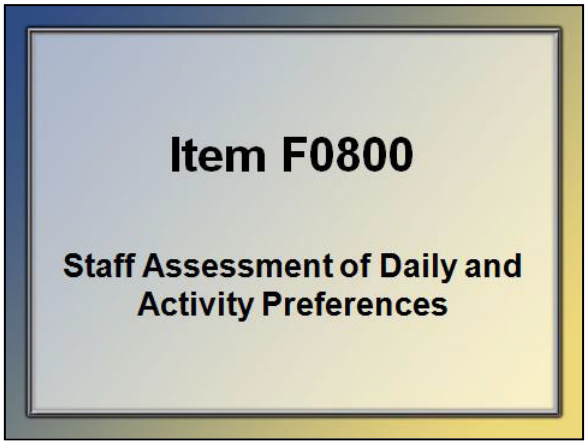
  If F0400 and F0500 **(**Interview for Daily and Activity Preferences) was completed by resident, family, or significant other

  Skip to Section G, Functional Status.

Emphasize skip pattern here.

- **Code 1. Yes**

  If **Interview for Daily and Activity Preferences** items (F0400 through F0500) were not completed because the resident, family, or significant other was unable to answer 3 or more items (i.e. 3 or more items in F0400 through F0500 were coded as **9 or "-")**.



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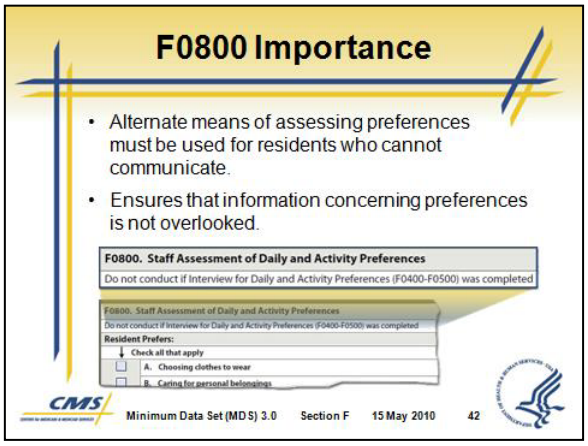
VIII. F0800 Staff Assessment of Daily and Activity Preferences

SLIDES	INSTRUCTIONAL GUIDANCE



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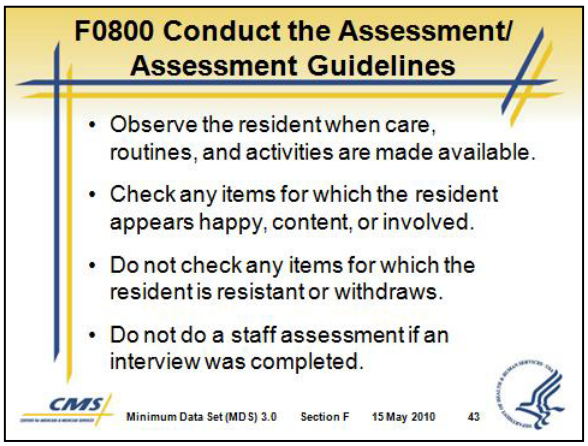
A. F0800 Importance

1. Alternate means of assessing preferences must be used for residents who cannot communicate.
2. This ensures that information about their preferences is not overlooked.



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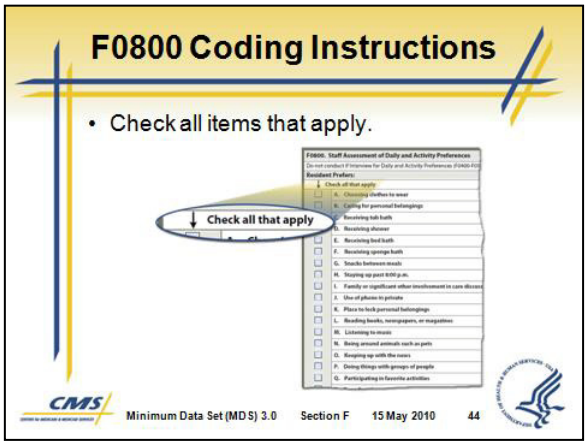
B. F0800 Conduct the Assessment/ Assessment Guidelines

1. Observe the resident when the care, routines, and activities specified in these items are made available to the resident.
2. Observations should be made by:
   a. Staff across all shifts and departments
   b. Others with close contact with the resident
3. If the resident is happy, content, or involved during an activity listed in F0800, then that item should be checked.
4. If the resident seems to resist or withdraw when these are made available, then do not check that item.
5. Do not do a staff assessment if an interview was completed.
6. A staff assessment is not meant to supplement an interview.

SLIDES	INSTRUCTIONAL GUIDANCE



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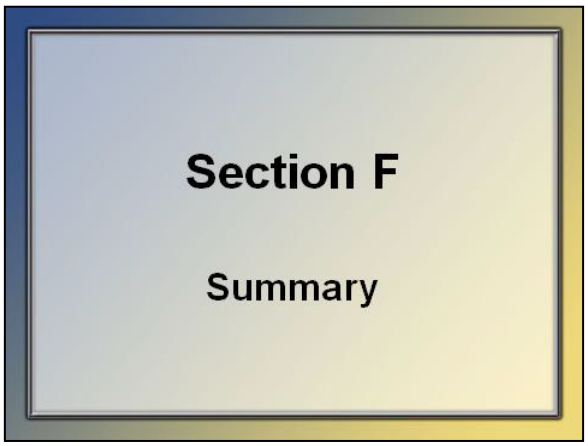
C. F0800 Coding Instructions

1. Check all items that apply in the look-back period.



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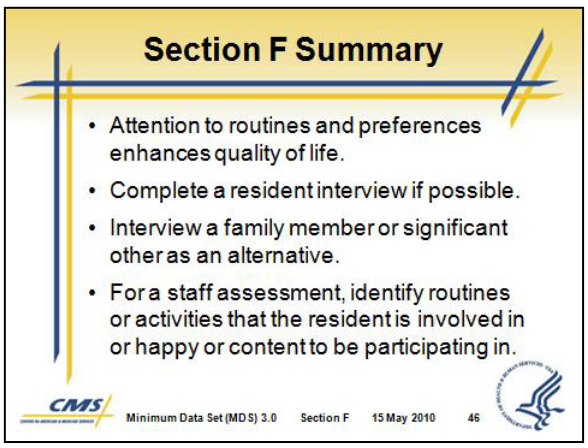
IX. Section F Summary



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A. Paying attention to a resident's preferences for daily routines and activities greatly enhances a resident's quality of life.

B. An interview with a resident should be completed if possible in order to allow the resident direct input and participation in identifying routines and preferences.

C. If the resident cannot complete an interview, try to interview a family member or significant other.

SLIDES	INSTRUCTIONAL GUIDANCE
	D. If completing a staff assessment, identify those routines and activities that the resident is involved in and is happy and content to be participating in.