

# **Section F**

## **Preferences for Customary Routine and 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.

# Section F Preferences for Customary Routine & Activities



# Importance

- Lack of attention to preferences and activities can result in:
  - o Boredom
  - o Depressed mood
  - o Behavior disturbances
- Resident responses can provide clues:
  - o Understanding pain
  - o Perceived functional limitations
  - o Perceived environmental barriers

# **Item F0300**

**Should Interview for  
Daily and Activity Preferences  
be Conducted?**

# F0300 Importance

- Interview allows residents to respond directly.
- Supports individualized daily care and activity planning.
- Family member or significant other can also provide information about routines and preferences.
- Conduct staff assessment if interview is not possible.

**F0300. Should Interview for Daily and Activity Preferences be Conducted?** – Attempt to interview all residents able to communicate. If resident is unable to complete, attempt to complete interview with family member or significant other.

Enter

Code

0. No (resident is rarely/never understood and family not available) → Skip to F0700, Should the Staff Assessment of Daily and Activity Preferences be Conducted?
1. Yes → Continue to F0400, Interview for Daily Preferences

**F0300. Should Interview for Daily and Activity Preferences be Conducted?** – A

resident is unable to complete, attempt to complete interview with family member or significant other.

# F0300 Conduct the Assessment

- Determine whether or not resident is rarely/ never understood.
- Determine if family/ significant other is available.
- Review A1100 Language to determine if the resident wants or needs an interpreter.

A1100. Language	
Enter Code	<b>A. Does the resident need or want an interpreter to communicate with a doctor or health care staff?</b>
<input type="checkbox"/>	0. No
	1. Yes → Specify in A1100B, Preferred language
	9. Unable to determine
	<b>B. Preferred language:</b>
	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

*Note: A blue oval highlights the options 0, 1, and 9 for question A.*

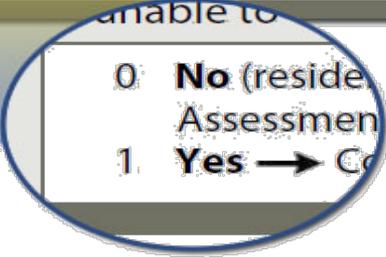
# F0300 Assessment Guidelines

- Conduct the interview if the resident can respond:
  - Verbally
  - By pointing to answers on cue cards
  - By writing out answers
- Interview family member or significant other.
  - Can be a source of useful information about resident preferences

# F0300 Coding Instructions

- **Code 0. No.**
  - If the interview should not be attempted with the resident.
- **Code 1. Yes.**
  - If the resident interview should be attempted.

Section F		Preferences for Customary Routine and Activities
<b>F0300. Should Interview for Daily and Activity Preferences be Conducted?</b> - Attempt to interview all residents able to complete. If resident is unable to complete, attempt to complete interview with family member or significant other		
Enter Code	<input type="checkbox"/>	0. <b>No</b> (resident is rarely/never understood and family/significant other not available) → Skip to and complete F0800, Staff Assessment of Daily and Activity Preferences
		1. <b>Yes</b> → Continue to F0400, Interview for Daily Preferences



**Items F0400/ F0500**

**Interview for Daily/ Activity  
Preferences**

# F0400/ F0500 Interview

## F0400. Interview for Daily Preferences

Show resident the response options and say: "While you are in this facility..."

↓ Enter Codes in Boxes

A. how important is it to you to choose what clothes to wear?

## F0400. Interview for Daily Preferences

Show resident the response options and say: "While you are in this facility..."

## F0500. Interview for Activity Preferences

Show resident the response options and say: "While you are in this facility..."

## F0500. Interview for Activity Preferences

# F0400 & F0500

## Conduct the Assessment

- Set up a conducive environment.
- Be sure the resident can hear you.
- Explain the reason for the interview.
- Explain the response options.
- Provide cue cards.
- Allow resident to respond multiple ways.
- Interview the family or significant others if the resident cannot report his or her preferences.

# F0400 & F0500 Assessment Guidelines<sub>1</sub>

- No look-back period is provided for the resident.
- Ask about current preferences while in the nursing home.
- Complete the interview anytime within the 7-day look-back period.
- Family or significant others can provide information on current preferences.
- May have to consider past preferences if the resident cannot communicate.

# F0400 & F0500 Assessment Guidelines<sub>2</sub>

- If the resident gives a long or indirect answer:
  - Summarize the response.
  - Ask again which option best applies.
  - This is referred to as echoing.
- Appropriate to explore the resident's answer and try to understand the reason.

# F0400 & F0500 Coding Instructions

## F0500. Interview for Activity Preferences

Show resident the response options and say: "While you are in this facility..."

↓ Enter Codes in Boxes

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

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?

Coding:

1. Very important
2. Somewhat important
3. Not very important
4. Not important at all
5. Important, but can't do or no choice
9. No response or non-responsive

**Coding:**

- 1 Very important
- 2 Somewhat important
- 3 Not very important
- 4 Not important at all
- 5 Important, but can't do or no choice
- 9 No response or non-responsive

group with the news?

meetings with groups of people?

participate in your favorite activities?

# Preferences Video



The Video on Interviewing Vulnerable Elders (VIVE) was funded by the Picker Institute and produced by the UCLA/JH Borun Center. DVD copies can be ordered from CMS.

# **Section F**

## **Coding Activity**

# Section F Practice #1

- The interviewer asks:

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

- The resident responds:

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

# How should F0400A be coded?

- A. Code **1**. Very Important
- B. Code **2**. Somewhat Important
- C. Code **3**. Not Very Important
- D. Code **4**. Not Important at All
- E. Code **5**. Important but Can't Do or No Choice
- F. Code **9**. No response

# Section F Practice #1 Coding

- The correct coding is **1**. Very Important.
- The resident indicates that this daily preference is very important.

# Section F Practice #2

- The interviewer asks: How important is it to you to choose what clothes to wear?
- The resident responds: I leave that up to the nurse. You have to wear what you can handle if you have a stiff leg.
- The interviewer echoes: You leave it up to the nurses. Would you say that, while you are here, choosing what clothes to wear is 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?
- The resident responds: Well, it would be important to me, but I just can't do it.

# How should F0400A be coded?

- A. Code **1**. Very Important
- B. Code **2**. Somewhat Important
- C. Code **3**. Not Very Important
- D. Code **4**. Not Important at All
- E. Code **5**. Important but Can't Do or No Choice
- F. Code **9**. No response

# Section F Practice #2 Coding

- The correct coding is **5**. Important but Can't Do or No Choice.
- The resident indicates that the daily preference is important, but he is unable to do it.

# Section F Practice #3

- The interviewer asks: How important is it to you to take care of your personal belongings or things?
- The resident responds: All of my important things are at home.
- 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?
- 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.

# How should F0400B be coded?

- A. Code **1**. Very Important
- B. Code **2**. Somewhat Important
- C. Code **3**. Not Very Important
- D. Code **4**. Not Important at All
- E. Code **5**. Important but Can't Do or No Choice
- F. Code **9**. No response

# Section F Practice #3 Coding

- The correct coding is **1. Very Important.**
- The resident indicates that it is “Very Important” to take care of a specific item in the facility.

# Section F Practice #4

- The interviewer asks: How important is it to have a place to lock your things to keep them safe?
- The resident responds: I have a safe deposit box at my bank, and that's where I keep my family heirlooms and personal documents.
- 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?
- The resident responds: It's not very important. I'm fine with keeping all my valuables at the bank.

# How should F0400H be coded?

- A. Code **1**. Very Important
- B. Code **2**. Somewhat Important
- C. Code **3**. Not Very Important
- D. Code **4**. Not Important at All
- E. Code **5**. Important but Can't Do or No Choice
- F. Code **9**. No response

# Section F Practice #4 Coding

- The correct coding is **3**. Not Very Important.
- The resident indicates that it is “Not Very Important” to have a drawer or locker at the facility.

# Section F Practice #5

- The interviewer asks: How important is it to listen to music you like?
- The resident responds: It's not important, because all we have in here is TV. They keep it blaring all day long.
- 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?
- The resident responds: Yeah. I'd enjoy listening to some jazz if I could get a radio.

# How should F0500B be coded?

- A. Code **1**. Very Important
- B. Code **2**. Somewhat Important
- C. Code **3**. Not Very Important
- D. Code **4**. Not Important at All
- E. Code **5**. Important but Can't Do or No Choice
- F. Code **9**. No response

# Section F Practice #5 Coding

- The correct coding is **5**. Important but Can't Do or No Choice.
- The resident reports listening to jazz is important to him, but he does not have a radio.

# Section F Practice #6

- The interviewer asks:  
How important is it to you to be around animals such as pets?
- The resident responds:  
It's very important for me NOT to be around animals. You get hair all around and I might inhale it.

# How should F0500C be coded?

- A. Code **1**. Very Important
- B. Code **2**. Somewhat Important
- C. Code **3**. Not Very Important
- D. Code **4**. Not Important at All
- E. Code **5**. Important but Can't Do or No Choice
- F. Code **9**. No response

# Section F Practice #6 Coding

- The correct coding is **4. Not Important At All.**
- The resident indicates reasons why she prefers to not be around animals at all.

# **Item F0600**

**Daily and Activity  
Preferences Primary  
Respondent**

# F0600 Primary Respondent

- Establishes the source of the information regarding the resident's preferences.

F0600. Daily and Activity Preferences Primary Respondent	
Enter	Indicate primary respondent for Daily and Activity Preferences (F0400 and F0500).
<input type="checkbox"/>	1. Resident
Code	2. Family or significant other (close friend or other representative)
	9. Interview could not be completed by resident or family/significant other ("No Response" to 3 or more items)

Indicate primary respondent for Daily

- 1 Resident**
- 2 Family or significant other** (close frie
- 9 Interview could not be completed b**

# **Item F0700**

**Should the Staff Assessment  
of Daily and Activity  
Preferences Be Conducted?**

# F0700 Importance

- Resident interview is preferred.
- Small percentage of residents are unable or unwilling to complete the interview.
- Should still have preferences considered.

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

Enter

Code

0. No (because Interview for Daily and Activity Preferences (F0400 and F0500) was completed by resident or family/significant other) → Skip to G0100, Activities of Daily Living (ADL) Assistance

1. Yes (because 3 or more items in Interview for Daily and Activity Preferences (F0400 and F0500) were not completed by resident or family/significant other) → Continue to F0800, Staff Assessment of Daily and Activity Preferences

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

# F0700 Assessment Guidelines

- If the total number of unanswered questions in F0400 through F0500 is equal to 3 or more, the interview is considered incomplete.
- If 3 or more interview items for either F0400 or F0500 are coded **9** or “-”, complete the Staff Assessment.

# F0700 Coding Instructions

- **Code 0.**
  - Interview completed by resident, family, or significant other.
- **Code 1.**
  - Resident, family, or significant other unable to answer 3 or more items in the interviews.

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

Enter  Code

0. No (because Interview for Daily and Activity Preferences (F0500) was completed by resident or family/significant other) → Skip to G0100

1. Yes (because 3 or more items in Interview for Daily and Activity Preferences (F0400 and F0500) were not completed by resident or family/significant other)

0. **No** (because Interview for Daily and Activity Preferences (F0500) was completed by resident or family/significant other) →

1. **Yes** (because 3 or more items in Interview for Daily and Activity Preferences (F0400 and F0500) were not completed by resident or family/significant other)

# **Item F0800**

**Staff Assessment of Daily and  
Activity Preferences**

# F0800 Importance

- Alternate means of assessing preferences must be used for residents who cannot communicate.
- Ensures that information concerning preferences is not overlooked.

## F0800. Staff Assessment of Daily and Activity Preferences

Do not conduct if Interview for Daily and Activity Preferences (F0400-F0500) was completed

## F0800. Staff Assessment of Daily and Activity Preferences

Do not conduct if Interview for Daily and Activity Preferences (F0400-F0500) was completed

### Resident Prefers:

↓ Check all that apply

- A. Choosing clothes to wear
- B. Caring for personal belongings

# F0800 Conduct the Assessment/ Assessment Guidelines

- Observe the resident when care, routines, and activities are made available.
- Check any items for which the resident appears happy, content, or involved.
- Do not check any items for which the resident is resistant or withdraws.
- Do not do a staff assessment if an interview was completed.

# F0800 Coding Instructions

- Check all items that apply.

**F0800. Staff Assessment of Daily and Activity Preferences**  
Do not conduct if interview for Daily and Activity Preferences (F0400-F0500)

**Resident Prefers:**

↓ Check all that apply

- A. Choosing clothes to wear
- B. Caring for personal belongings
- C. Receiving tub bath
- D. Receiving shower
- E. Receiving bed bath
- F. Receiving sponge bath
- G. Snacks between meals
- H. Staying up past 8:00 p.m.
- I. Family or significant other involvement in care discussion
- J. Use of phone in private
- K. Place to lock personal belongings
- L. Reading books, newspapers, or magazines
- M. Listening to music
- N. Being around animals such as pets
- O. Keeping up with the news
- P. Doing things with groups of people
- Q. Participating in favorite activities

A callout bubble with a blue border and a white background contains the text "Check all that apply" with a downward-pointing arrow, highlighting the instruction in the form.

# **Section F**

## **Summary**

# Section F Summary

- Attention to routines and preferences enhances quality of life.
- Complete a resident interview if possible.
- Interview a family member or significant other as an alternative.
- For a staff assessment, identify routines or activities that the resident is involved in or happy or content to be participating in.