

Screening for Decision-Making Ability When Working with APS Clients

Transfer of Learning (TOL): *Desk Guide*

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SCREENING FOR DECISION-MAKING ABILITY WHEN WORKING WITH APS CLIENTS

Desk Guide

How to Use:

This Desk Guide is a Transfer of Learning (TOL) designed as a companion to NAPSA Core Competency Module 17: Screening for Decision-Making Ability When Working with APS Clients, both eLearning and Instructor Led Training (ILT) modalities. This can be used to compliment the material from either training modality, not in lieu of completing the training.

This TOL can be used in a variety of settings to include:

- As a refresher Instructor-Led Training (virtual or in-person) with support from a facilitator after staff have completed Module 17
- During supervision when coaching staff around the skills of screening for decision-making ability
- Unit Meeting as a group activity paired with a case scenario or added discussion with guidance from a Supervisor or Lead Staff
- Individually as a memory jog when in the field prior to interviewing clients
- BONUS: brainstorm with colleagues screening questions for various allegations where decision-making is in question.

Overview of Screening for Decision-Making Ability:

Why do we need screen for decision-making ability in protective services?

- It is an important aspect of the work we do and has a major impact on the clients we serve.
- We need to have a firm understanding of decision-making and where it intersects with protective services. Often, we will have cases where we are asking the following: can the client remain in this situation, can the client make the decision to refuse intervention, can the client understand the risk of their situation, or can the client engage in certain behaviors.
- Frequently, we will interact with a client that displays some level of cognitive impairment, and it is important for us to determine their ability to make decisions about their life.

Decision-making is task specific and is on a continuum. We must screen for decision-making ability as it relates to the specific circumstances that are present for that client. Financial management, medical treatment, sexual consent, and marriage are all different types of decision-making capacity.

Domains of decision-making

1. Orientation – is the client able to understand where they are, the current timing, and who they are (and where they are at in their life)? Remember, decision-making capacity and ability are not determined just because someone is, or isn't, alert and oriented.
 - a. Example questions: "What season are we in?" "What day of the week is it today?" followed with "What day will it be tomorrow?"
2. Attention – is the client able to focus on the conversation, the current environment, and the situation?
 - a. Example statement: "Tell me what you understand of what I just shared." or "Can you summarize the information I provided."
3. Memory – both short-term and long-term memory are important in the decision-making process. Short-term memory allows us to retain recent information, while long-term memory is pulled from to evaluate how we have dealt with similar situations in the past.
 - a. Example questions: "What did you eat today?" (Short term) and "What is your Date of Birth" or "Who would call if something was wrong. Can you show me how you would call them?" (Long term)
4. Language – can the client understand spoken language, are they able to communicate their choices or thoughts (either verbally or in writing). Do they have language impairments that need considered during the screening process?
5. Visual-spatial – can the client understand the relationship between their environment and situation. Does the client understand what can and can't be possible in their current environment, as it relates to changes or adaptations?
6. Executive function – the "command center". This cognitive system is highly complex and can be influenced by sensory deficits. This domain is discussed in more detail below.

Attributes of decision-making

1. Receive and comprehend relevant information
 - a. Is the client able to receive and comprehend relevant information relating to their situation? This ability can be impacted by sensory deficits such as vision or hearing impairments. We may have to modify how we communicate information to a client so they can overcome these deficits.
2. Express choice consistently
 - a. Is the client able to consistently express their choices? Do they maintain their choice or desire over time? Is the client able to consistently express the reasons for the decisions they are making?
3. Appreciate nature and significance of condition
 - a. Does the client understand the nature and significance of the situation they are in? Do they understand the severity of the medical condition or financial situation they are currently in? Can the client communicate the risks that their situation puts them in? Is the client able to communicate possible outcomes if their situation is not addressed?
4. Balance risk, benefits, and burden of choices
 - a. As adults, we are assumed to have the ability to make decisions. We've all heard about people making "bad decisions", but is it truly a bad decision or a decision that we do not agree with? Cultural awareness is an important aspect of assessing this attribute. Culture can play an important role in decision-making. It can increase the burden or effort required, it can minimize the benefit of interventions offered or accepted, and it can also be the basis for refusal. It is important for APS professionals to understand the relationship between culture and choice.
5. Communicate rational choices
 - a. Just about everyone can communicate a choice. What we want to screen for are **the reasons** that the choice is being made. Is the client able to provide rational reasons for the choices they are making, are the reasons based upon values and beliefs that may be different from our own? Is the client able to communicate the "why" and does it make sense for their situation?

Dr. Bryan Kemp provides a framework with four questions APS professionals can use when screening someone’s ability to make informed decisions. In the table below, the **Framework Questions** are numbered, the framework examples are on the *left*, and examples of how to ask these questions for a financial abuse allegation where decision-making ability is of concern is on the left. Blank spaces are provided to allow for developing additional questions for other specific situations where decision-making is in question (e.g. sexual consent, medical treatment, etc.).

1. Can they understand their situation?	
<i>Do you realize you have a significant cut on your leg?</i>	Do you think some people are financially taken advantage of?
2. What is the quality of their thinking process?	
<i>What can you do to treat the cut?</i>	What would you do if someone was taking advantage of your finances?
3. Is the client able to demonstrate and communicate choice consistently?	
<i>Do you want to get treatment on your leg?</i>	Do you want to report the financial abuse? (why or why not?)
4. Does the client appreciate and understand the nature of their situation?	
<i>What will happen if you do not get treatment for the cut?</i>	What are some things that might happen if (name of Alleged Perpetrator) continues to use your debit card?

Executive function

It is important for APS professionals to understand the importance of executive function and how to screen for possible deficits. Here are some aspects that executive function is involved with:

1. Abstract reasoning
 - Can I see the overall picture or goal from the small details or tasks?
Can I form or follow theories?
2. Adapting to change
 - What have I historically based this decision on and what has changed? Technology and access to information, and misinformation, requires us to modify behaviors and approach.
3. Planning and evaluating
 - What do I need to do to reach my goal? What steps are necessary?
4. Anticipating outcomes
 - If I go down this path, what are the possible outcomes? How likely are some of those outcomes? How does a particular outcome fit with what I am basing my decision on?
5. Inhibiting inappropriate behaviors
 - The last time I did this, I did not get the desired outcome. I also didn't like the response and way that my behavior was accepted.
6. Managing time
 - This is especially important for multi-step responses. Are my time realistic? Can I complete in the desired time frame while planning for interruptions?

Executive function and problem solving.

1. Perception
 - Are there any perceptual deficits that impact a client's able to receive information? Intellectual deficits can also impact a client's ability to perceive the significance of information.
 - Example – you are cooking dinner and start to smell something.
2. Recognizing a problem
 - If a client is not able to recognize that there is a problem, they will not see a need to change their situation or behavior. This aspect is also part of the change process, or stages of change.
 - You recognize that smell as something burning.

3. Foreseeing outcomes

- This ability is a testament to abstract thinking. The ability to envision outcomes that have not, or may not happen, requires abstract thinking. The ability to see possible outcomes or the progression of their situation and the timing of those outcomes is an important aspect of decision-making. Are these possible outcomes immediate or imminent, or are they longer-term outcomes that may impact the client in three or five years?
 - What will dinner be like if I don't address the situation?

4. Formulating a plan

- Is the client able to put the steps together, in a semblance of order, that are necessary for addressing the situation? Are they able to provide enough detail to understand the steps necessary, or effort required?
 - I want my meal to be enjoyable, so here is what I need to do to fix it. Do I need to start everything over? What order do these steps need to be taken?

5. Executing the plan

- What steps is the client able to do for themselves, what steps do they need assistance with, are the expected actions reasonable based upon the client's circumstances.
 - I need to follow these steps to address the burnt portion of dinner.

6. Evaluating the plan

- This is a critical aspect of problem solving. If a client is not able to evaluate the effectiveness of the plan, or if it accomplished the goals for the situation, they may still be at risk or have unmet needs.
 - Because I started the meal over, and changed how I prepared it, I now have the meal that I anticipated, and it is delicious.

Factors that may impact decision-making ability

1. Mental health – there are numerous different mental health conditions and situations that can impact decision-making ability. Depression is a commonly over-looked condition in older adults and can have a profound impact on decision-making. Depression can impact motivation or perceiving a better situation and can hinder a client’s ability to see the value in making a change.
2. Medications and medical conditions – Just like with mental health, medications and medical conditions can impact decision-making ability. Acute conditions such as urinary tract infections can mimic the symptoms of a neurocognitive disorder, but once treated the client is back to their normal level of cognitive functioning.
3. Timing of interview – Individuals with neurocognitive disorders may function better at certain times of the day. It is important to try and assess their ability during the times that they do their best.
4. Cultural impact of decision-making –the impact that cultural differences have in the decision-making process can be profound. As part of the screening process, APS professionals need to evaluate if there are cultural reasons that are influencing the decision-making process.

Interview as a screening tool

It is important to remember that your interview is a method of screening for decision-making ability.

- Screening questions can be interwoven throughout the interview to minimize the impact on rapport you have with the client.
- Provide as much information as necessary, or in ways that the client will understand, to assist with screening their ability to make decisions. Complex situations such as medical conditions and treatment or financial eligibility for benefits may need to be discussed using language that the client will better understand.
- Use questions to assess the “**WHY**” – there may be very justifiable reasons that the individual is behaving a certain way, or wants things done a certain way. “Why is this important to you?”, “If you could change your situation, what would you want to be different and why is that important to you?”

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OUR WHY:

REVOLUTIONIZE
THE WAY PEOPLE
WORK TO ENSURE
THE WORLD IS A
HEALTHIER PLACE.



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