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School of Medicine
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Pre-IDA: Preparing for interview

Date _____

Primary Language Spoken

A. Possible Risks: Check all that the client seems to be facing at this time

Abuse

- ☐ Physical Injury
- ☐ Mental Injury
- ☐ Sexual Abuse
- ☐ Unreasonable use of a physical restraint, isolation or medication
- ☐ A threat or menacing conduct

Self-Neglect

- ☐ Medical (medical care, leaving AMA, not taking medications, etc.)
- ☐ Refusal of community supports
- ☐ Failure to thrive
- ☐ Inadequate food
- ☐ Suicidal
- ☐ Eviction
- ☐ Unsafe housing (filth, vermin, squalid living conditions, inadequate utilities)

Financial Exploitation

- ☐ Misappropriation of property
- ☐ Intentionally taking unfair advantage of physical or financial resources when the known adult lacks capacity to consent
- ☐ Person in position of trust takes money or property not in due and lawful execution of trust or benefit
- ☐ Breach of fiduciary duty, the misuse of power of attorney, trust or guardian/conservatorship as it relates to property, income, resources or trust funds
- ☐ Use of deception, intimidation, coercion, extortion, or undue influence by a person or entity to obtain or use adult's property, income, resources, or trust funds for profit of such person

Neglect

- ☐ By caretaker
- ☐ By another person

B. Identified Risk: Circle the risk above that you believe poses the highest level of endangerment

What wording will you use to describe this risk to the client?

C. Introduction: Consider how you will introduce IDA to the client

For example: *“So let’s talk now about some of the decisions that you might be making”.*

Or possibly *“Now I’m going to be asking you some important questions having to do with decisions that you might be making. Will that be OK?”*

D. Interview Instructions: Use the risk identified in the Pre-IDA for IDA Steps 1, 2, & 3

IDA Step 1 - Assessing the Risk in General (Understanding)

A. APS worker asks the client if he/she understands that other people confront the identified risk.

One way to ask: *"I'd like to discuss your thoughts about whether you think that [insert risk] can happen to others?"*

B. If the client understands that others can have the risk, APS worker asks the client to explain what could happen if the risk is not addressed. One way to ask: *"Suppose someone faces [insert risk], and doesn't do anything about it, what might happen to him/her?"*

Worker Judgment

Do you think the client understands the risk in general? (check one)

- ☐ Yes
- ☐ Maybe
- ☐ No (If No, stop the interview and speak with your supervisor)

What did the client say that brought you to this judgment? Record the client's own words as closely as possible:

Describe the client's emotions, reactions, non-verbal gestures:

IDA Step 2 - Insight into the Risk on a Personal Level (Appreciation)

A. APS Worker asks the client if he/she is experiencing this risk.

One way to ask: *"I'd like to learn more about **you**. Even though we may have already touched on this in our conversation, do you think **you** are facing [insert risk]?"*

Possible probes: *"Can you tell me why?"*
or *"I'd like to know more about your thoughts on this."*

Worker Judgment

Do you think the client has insight that he/she could personally be experiencing this risk? (check one)

- ☐ Yes
- ☐ Maybe
- ☐ No (If No in IDA Step 3, skip question A and complete only B and C)

What did the client say that brought you to this judgment? Record the client's own words as closely as possible:

Describe the client's emotions, reactions, non-verbal gestures:

IDA Step 3 - Ability to Weigh Advantages/Disadvantages of a Plan for Addressing Risk (Reasoning)

A. APS worker asks if the client has a plan to address the risk.

“What are your plans to address the possibility of [insert risk]?”

“How would that help address the possibility of [insert risk]?”

B. If the client lacks insight (IDA Step 2) or a workable plan (IDA Step 3A), APS worker suggests an alternative plan to address the risk. *"Would you consider (insert plan) to address the possibility of [insert risk]? Tell me your thoughts."*

C. APS worker asks the client about advantages and disadvantages of a workable plan (from IDA Step 3A or 3B) to address the risk.

*“What would be the **advantages** for you having (insert plan) to address the possibility of [insert risk]?”*

*What would be the **disadvantages** for you having [insert plan] to address the possibility of [insert risk]?”*

Worker Judgment

Does the client have the ability to weigh the advantages/disadvantages of a plan to address the risk? (check one)

- ☐ Yes
- ☐ Maybe
- ☐ No

What did the client say that brought you to this judgment? Record the client's own words as closely as possible:

Describe the client's emotions, reactions, non-verbal gestures:

Post-IDA - Next Steps

Risk used for IDA

Estimated time
spent conducting
this interview

Summary of Worker Judgments

**Step 1 -
Assessing the
Risk in General
(Understanding)**

- ☐ Yes
- ☐ Maybe
- ☐ No

**Step 2 - Insight
into the Risk on a
Personal Level
(Appreciation)**

- ☐ Yes
- ☐ Maybe
- ☐ No

Post-IDA - Next Steps

Summary of Worker Judgments

Step 3 - Ability to Weigh Advantages/Disadvantages of a Plan for Addressing Risk (Reasoning)

- ☐ Yes
- ☐ Maybe
- ☐ No

Were there any barriers to completing the IDA (hearing or speech problems, language comprehension, other)?

- ☐ Yes
- ☐ Maybe
- ☐ No

Describe the barriers:

Next Steps (check all that apply)

- | | |
|---|---|
| <input type="checkbox"/> Use the IDA to help clarify the client's thinking about the risk | <input type="checkbox"/> Consider referral for professional capacity assessment |
| <input type="checkbox"/> Discuss client's decisional ability with supervisor | <input type="checkbox"/> Other (describe on the lines immediately below) |
| <input type="checkbox"/> Incorporate IDA into your overall APS Assessment | |
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Additional Notes
