

# Instructions for Activities of Daily Living (ADL) and/or Instrumental Activities of Daily Living (IADL) Administration

**Read the following statement:** "Now I'd like to ask you about some of the activities of daily living , things that we all need to do as a part of our daily lives. I would like to know if you can do these activities without any help at all." Guide the interview along the lines of the ADL or IADL questionnaire. The results are reported to the attending as: "The patient is dependent in the following areas..."

# INDEX OF A.D.L.

A. KATZ

## INDEX OF INDEPENDENCE IN ACTIVITIES OF DAILY LIVING

The Index of Independence in Activities of Daily Living is based on an evaluation of the functional independence or dependence of patients in bathing, dressing, going to toilet, transferring, continence, and feeding. Specific definitions of functional independence and dependence appear below the index.

- A - Independent in feeding, continence, transferring, going to toilet, dressing, and bathing.*
- B - Independent in all but one of these functions.*
- C - Independent in all but bathing and one additional function.*
- D - Independent in all but bathing, dressing, and one additional function.*
- E - Independent in all but bathing, dressing, going to toilet, and one additional function.*
- F - Independent in all but bathing, dressing, going to toilet, transferring, and one additional function.*
- G - Dependent in all six functions.*
- Other - Dependent in at least two functions, but not classifiable as C, D, E, or F.*

**Independence** means without supervision, direction, or active personal assistance, except as specifically noted below. This is based on actual status and not on ability. A patient who refuses to perform a function is considered as not performing the function, even though he is deemed able.

### **Bathing (Sponge, Shower, or Tub)**

*Independent:* assistance only in bathing a single part (as back or disabled extremity) or bathes self completely

*Dependent:* assistance in bathing more than one part of body; assistance in getting in or out of tub or does not bathe self

### **Dressing**

*Independent:* gets clothes from closets and drawers; puts on clothes, outer garments, braces; manages fasteners; act of tying shoes is excluded

*Dependent:* does not dress self or remains partly undressed

### **Going to Toilet**

*Independent:* gets to toilet; gets on and off toilet; arranges clothes; cleans organs of excretion; (may manage own bedpan used at night only and may or may not be using mechanical supports)

*Dependent:* uses bedpan or commode or receives assistance in getting to and using toilet

### **Transfer**

*Independent:* moves in and out of bed independently and moves in and out of chair independently (may or may not be using mechanical supports)

*Dependent:* assistance in moving in or out of bed and/or chair; does not perform one or more transfers

### **Continence**

*Independent:* urination and defecation entirely self-controlled

*Dependent:* partial or total incontinence in urination or defecation; partial or total control by enemas, catheters, or regulated use of urinals and/or bedpans

### **Feeding**

*Independent:* gets food from plate or its equivalent into mouth; (precutting of meat and preparation of food, as buttering bread, are excluded from evaluation)

*Dependent:* assistance in act of feeding, (see above); does not eat at all or parenteral feeding

**EVALUATION FORM**

Name \_\_\_\_\_ Day of evaluation \_\_\_\_\_

For each area of functioning listed below, check description that applies. (The word "assistance" means supervision, direction, or personal assistance).

**Bathing** — either sponge bath; tub bath, or shower.

Receives no assistance (gets in and out of tub by self if tub is usual means of bathing)

Receives assistance in bathing only one part of the body (such as back or a leg)

Receives assistance in bathing more than one part of the body (or not bathed)

**Dressing** — gets clothes from closets and drawers - including underclothes, outer garments and using fasteners (including braces if worn)

Gets clothes and gets completely dressed without assistance

Gets clothes and gets dressed without assistance except for assistance in tying shoes

Receives assistance in getting clothes or in getting dressed, or stays partly or completely undressed

**Toileting** — going to the "toilet room" for bowel and urine elimination; cleaning self after elimination, and arranging clothes

Goes to "toilet room", cleans self, and arranges clothes without assistance (may use object for support such as cane, walker, or wheelchair and may manage night bedpan or commode, emptying same in morning)

Receives assistance in going to "toilet room" or in cleansing self or in arranging clothes after elimination or in use of night bedpan or commode

Doesn't go to room termed "toilet" for the elimination process

**Transfer**

Moves in and out of bed as well as in and out of chair without assistance (may be using object for support such as cane or walker)

Moves in and out of bed or chair with assistance

Doesn't get out of bed

**Continence**

Controls urination and bowel movement completely by self

Has occasional "accidents"

Supervision helps keep urine or bowel control; catheter is used, or is incontinent

**Feeding**

Feeds self without assistance

Feeds self except for getting assistance in cutting meat or buttering bread

Receives assistance in feeding or is fed partly or completely by using tubes or intravenous fluids

SOURCE : Katz (S.), Downs (T.D.), Cash (H.R.), Grotz (R.C.), *Gerontologist*, 1970, I, 20-30.  
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**INSTRUMENTAL ACTIVITIES OF DAILY LIVING  
(IADL) SCALE**  
Department of Family Practice  
Division of Geriatrics

Interviewer: \_\_\_\_\_

Date: \_\_\_\_\_

Circle the number of the one statement in each category that best describes the subject.

Positive  
\* Negative

**USE OF TELEPHONE**

1. - Operates telephone on own initiative and looks up and dials numbers.
2. - Dials a few well-known numbers.
3. - Answers telephone but doesn't dial.
- \*4. - Doesn't use telephone at all.

**SHOPPING**

1. - Takes care of all shopping needs independently.
- \*2. - Shops independently for small purchases.
- \*3. - Needs to be accompanied on any shopping trip.
- \*4. - Completely unable to shop.

**FOOD PREPARATION**

1. - Plans, prepares, and serves adequate meals independently.
- \*2. - Prepares adequate meals if supplied with ingredients.
- \*3. - Heats and serves prepared meals, or prepares meals but doesn't maintain adequate diet.
- \*4. - Needs to have meals prepared and served.

**HOUSEKEEPING**

1. - Maintains house alone or with occasional assistance (for example, for heavy work or by domestic help).
2. - Performs light daily tasks, such as dishwashing and bedmaking.
3. - Performs light daily tasks but can't maintain acceptable level of cleanliness.
4. - Needs help with all home maintenance tasks.
- \*5. - Doesn't participate in any housekeeping tasks.

**LAUNDRY**

1. - Does personal laundry completely.
2. - Launders small items (rinses, socks, stockings, etc.)
- \*3. - Needs to have all laundry done by others.

## TRANSPORTATION

1. - Travels independently on public transportation or drives own car.
2. - Arranges own travel by taxi but doesn't otherwise use public transportation.
3. - Travels on public transportation when assisted or accompanied by another. (women, \*men).
- \*4. - Travels only by taxi or car with assistance of another.
- \*5. - Doesn't travel at all.

## MEDICATIONS

1. - Is responsible for taking own medications in correct dosages at correct times.
- \*2. - Takes responsibility if medications are prepared in advance in separate doses.
- \*3. - Isn't capable of dispensing own medications.

## FINANCES

1. - Manages financial matters independently (budgets, writes checks, pays rent, goes to bank); collects and keeps track of income.
2. - Manages day-to-day purchases but needs help with major purchases, banking, etc.
- \*3. - Incapable of handling money.

Total Number of Items Starred \_\_\_\_\_

Adapted from Lawton MP, et.al. Gerontologist, 1969;9:179.