

Summary Page:

When completing the summary page, it is important give details not captured during the interview that may be important later. An informant must be available in person or by phone for any assessment done for redetermination. The only time an informant may not be present is during initial eligibility determination for services. Even then, a very good reason needs to be noted in the summary section.

The summary page must include information about the informant as well. This would include details about whether the informant was not helpful when providing answers and if the informant was present in person if feedback from an informant was obtained at a different time. Details about how information was obtained through observation at various times, separate interviews with client and informant, or conflicting information between informant and client should be explained in this section. Any historical knowledge or background information that would be particularly useful is also helpful in this section. Even if the client scored well in particular area, the current situation may not be reflective of the scores. This should be noted in the summary.

The summary page should include a summary of the applicant's strengths and weaknesses from each category, descriptions to support your findings of functional limitations/ no functional limitations, information regarding the informant and their overall value to the administration of the MOCABI, any assistance required to complete the personal data sheet.

Summary Example:

Bugs Bunny was found to have 4 functional limitations in the areas of Learning, Expressive/Receptive Communication, Mobility and Self-Direction. No limitations were found in the remaining 2 areas. The interview was conducted in the natural home of the applicant with the individual's father acting as the informant. Bugs' father was very helpful and allowed Bugs to answer each item then gave his own personal experience and observations regarding Bugs' abilities. Bugs regularly completes all of his self-care independently and was able to demonstrate this to the administrator. Bugs has limitation in mobility because he cannot walk up stairs without assistance. Item number 2 mobility was scored NO LIMITATION, but the item Across all Environments for the mobility category was scored a LIMITATION because he refuses to carry a cane and if there is not a handle to assist with walking up stairs he will have to take an elevator or find another location to walk up a curb or into a building. Bugs' was able to identify all coins, but struggled with counting change. He knew 4 quarters equals \$1.00 but could not add up dimes, nickels or pennies to make change. Bugs communicated with the administrator, however was limited in his ability to comprehend and respond to questions that would be asked when ordering a meal or asking for assistance locating an item at a store. His dad is his guardian because Bugs does not understand major decisions such as safe places to live, how to drive or enter into contracts. His dad is concerned he would be taken advantage of without a guardian. He establishes and maintains friendships with two young men he has known since high school. Bugs doesn't have a limitation in the area of Independent Living and Economic Self-sufficiency because he regularly completes chores and Bugs makes decisions about where to go and what activities he will participate in on a regular basis. He is left alone on the weekend when his mom and dad go out of town. He has had a job for 4 years cleaning tables at the mall food court. Bugs described what traits he exhibits that make him a good employee and his dad reports that his employers appreciate what a hard worker he is. He knows how to find a job if he wanted a different one and stated that someday he would like to be a police officer. Bugs knows he would have to go to Police Academy to do be able to become a police officer. When asked to complete the personal data sheet, individual was unable to read the instructions aloud. His comprehension of the questions throughout the assessment appeared to be fairly low. The Administrator was required to rephrase many questions to ensure clarity. Individual was unable to complete the personal data sheet without using an assistive device (note card). Individual

spent 15 minutes attempting to complete the personal data sheet and was unable to adequately answer the two questions at the bottom of the page without guidance and clarification from the informant.