

## **Instructions for Completion of Self-Administration Assessments (SAA)**

### **When should a Self-Administration Assessment be completed?**

An individual who can safely self-administer prescribed medication or receive assistance with self-administration of prescribed medication has the right to do so. Prior to restriction of an individual's right to self-administer medication, or perform health care tasks, the DODD approved Self-Administration Assessment (SAA) must be completed. (OAC [5123-6-02](#)). An SAA is not completed to confirm the individual's ability to self-administer medications and treatments. An individual is presumed to be able to self-administer unless there is an indication that the individual wants/needs support. The results of the assessment assist the team in determining the supports that are necessary to accomplish safe and accurate medication administration.

- Indications that an individual may need help with medication administration/treatments/health-related activities, and that an SAA should be done can include:
  - Individual/guardian/advocate/team requesting support with medication administration/treatments/health-related activities.
  - Individual needs assistance with other Activities of Daily Living (ADLs) that require similar skills to those needed for medication administration.
  - Individual indicating or exhibiting lack of awareness with medication or medication routine.
    - Medication refills indicate medications not being taken as prescribed, i.e., refill too soon or not needed.
- The SAA must be completed at a minimum of every three years; with a review for potential status changes done at least annually. The reassessment may indicate changes in the level/type of supports needed. Supports may need to be increased or decreased due to development of knowledge, skills, and ability.
- A reassessment may need to be completed for any of the following occurrences:
  - A change in medication route or packaging or medication delivery system
  - A change in service setting/medication routine (new location, new provider)
  - A change in the individual's health status
  - Individual not using supports already identified to assist with medication administration
  - A change in functional status of other Activities of Daily Living (ADLs)
  - A change in nutritional formula packaging
  - Any other event that can affect the steps the individual completes or with which support is needed.
- When an individual who has historically been able to self-administer but due to a change is unable to do so safely, the SAA is completed to determine what supports are needed. The supports are provided according to the assessment result(s) and listed in the ISP. Examples are:
  - Physical/psychiatric illness affecting memory or functional capacity
  - Health status change - post-operative, extended hospitalization
  - Environmental changes during which time is needed to transfer skills to the new environment
- Children under the age of 18 do not have an inherent right to self-administer. The guardian/team may allow for self-administration. The assessment may be completed as a guide for service planning and education as children reach transition age.
- The SAA is completed when medications are administered by family members as natural support and as paid providers (shared living, Independent Provider, or agency provider).

### **Where to complete the SAA?**

Complete the assessment in each location where the individual receives medication/treatments or health-related activities. Knowledge and skill may/may not transfer across different locations. Take into consideration the location and circumstances under which the medication/treatment will be needed when completing the assessment. A single form may be used for multiple settings when the result of the assessment is the same; list all settings assessed.

### **Who completes the SAA?**

- It is recommended that the SAA be completed by a person who knows the individual well and is knowledgeable about their mode of communication. When possible, it is recommended that a second observer be present to ensure results are indicative of the individual's capacity to safely self-administer.
  - The person completing the assessment needs to have detailed information about currently prescribed medications/treatments/health-related activities, including medication name, dose, route, and time.
  - When nurse delegation is required, a nurse must do the assessment.
- The SAA for Medications, Nutrition, Fluids per G/J Tube, or Insulin/Metabolic Glycemic Disorder medications must be completed by a nurse. If the nurse does not know the individual well, a second observer who does and who is also familiar with the individual's mode of communication should be present to ensure the results are indicative of the individual's capacity to safely self-administer.
- The service and support administrator (SSA) or qualified intellectual disability professional (QIDP), as applicable, shall ensure that a department-approved SAA is completed for an individual who requires prescribed medication administration.

### **Important Considerations:**

- ✓ The approach to the SAA should be trauma informed and person-centered. Every effort should be made to assure the individual feels comfortable, calm, unhurried, and unthreatened by the assessment process. The assessment should never be applied like a quiz or a test.
- ✓ The individual being assessed may not be able to state medical terminology; relaying content/intent in their own words or phrases is sufficient.
- ✓ The individual has the right to do as many steps of self-administration as they can, either independently or with support, even if they are assessed to be unable to self-administer with or without assistance. The team provides only the necessary support for the steps the individual cannot do. For example: the results of the SAA indicate the individual cannot self-administer but is able to physically press down on the inhaler or apply a topical medication once the appropriate dose is placed in a cup.
- ✓ Multiple SAAs may be needed if the individual's knowledge and skills vary with different medications/treatments/circumstances. For example: skills may vary when an individual receives multiple medications at 8 a.m., but only one medication at 12 p.m., or a topical medication.
- ✓ Complete the specific SAA Form as designed for: Oral and Topical Medications; Inhaled Medications; Oxygen Administration; Health-Related Activities such as obtaining temperature or blood pressure; Glucometer; Medications, Nutrition, Fluids per G/J Tube; Insulin/Metabolic Glycemic Disorder Medications.

### **Using the form:**

- Answer every assessment question on the form; questions are answered with a "Yes", "No" or "N/A".
- Record the result of the assessment. One of the 3 possible results will be determined based on the assessment:
  - Able to self-administer without assistance:
  - Able to self-administer with assistance:
    - ✓ The OhioISP should clearly identify which of the three types of assistance is needed and who will provide assistance (OAC 5123-6-02(D)).
  - Unable to self-administer with or without assistance:

- ✓ The OhioISP should clearly identify what steps of medication/treatments/health-related activities the person can do, and who will provide the other steps of the medication administration process.

❖ **The SSA/QIDP will ensure the results of the SAA are identified in the OhioISP. The OhioISP will identify when the individual needs help with medication administration and will describe in detail (for example, use of technology, desired outcomes) what the individual can do and what supports will be provided to accomplish safe and accurate medication administration.**

- This support can be provided by family members, independent providers, agency providers, and/or natural supports.
- This includes medication administration support by family members as natural support and as paid providers (shared living, independent provider, or agency provider).
- All supports noted in the OhioISP must be linked to an assessment. The assessment drives planning. The assessment summary should capture what is important to and for a person, as well as their skills and abilities and known and likely risks.

**Other Considerations:**

Other mitigating factors will be addressed in the OhioISP, identifying the supports necessary for safe medication administration. This may include risk factors that are identified in the OhioISP.