

Walking Improvement: Facility Assessment Checklists

This is a series of self-assessment checklists for nursing home staff to use to assess processes related to walking improvement in the facility, in order to identify areas that need improvement. You will find the checklists most useful if you need to look at your current practice more critically.

Directions

- These checklists are designed for the director of nursing (DON), quality improvement director, rehabilitation director, restorative program manager, or another team leader who knows the facility.
- The person completing the checklist should consult with appropriate staff in answering certain questions.

Use these checklists as the starting point for a quality improvement project guided by the Quality Improvement Worksheets. When answering questions on the checklists, if you are not sure or answer “no” to one of the questions, see the Quality Improvement Worksheet A: Identifying Areas for Improvement to collect data to investigate further.

Included

Checklists on the following walking improvement-related topics are included:

- Screening for Walking Improvement Potential
- Assessing Walking Improvement Potential
- Assessing Process for MDS Coding of Walking Ability
- Developing Care Plans for Walking Improvement
- Monitoring Walking Ability
- Policy and Procedures for Maintaining and/or Improving Walking Ability
- Staff Training & Education for Maintaining and/or Improving Walking Ability

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Checklist: Screening for Walking Improvement Potential

Does your facility have a process to screen a resident's walking improvement potential?

- _____ **No.** If no, this is an area for improvement. Use this checklist and the Quality Improvement Worksheets to guide your team in implementing a process for screening walking improvement potential among your residents.
- _____ **This is an area we are working on.** Our target date for revising our process for screening walking improvement potential is _____. If needed, use the Quality Improvement Worksheets to guide your improvement process.
- _____ **Yes.** Please continue to the questions below.

Does your facility's process for screening walking improvement potential include the following components?

	Yes	No	Person Responsible:	Comment:
1. Does your process include who, when, and how the residents will be screened for the potential for walking improvement?	<input type="checkbox"/>	<input type="checkbox"/>		
2. Are residents screened for the potential for walking improvement: At admission? With each readmission? With each MDS assessment? With each change in condition?	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		
3. Are residents screened using a standardized, measurable method or tool? (e.g. MDS balance testing)	<input type="checkbox"/>	<input type="checkbox"/>		
4. Is there a form or document used to record the information gathered in the screening process?	<input type="checkbox"/>	<input type="checkbox"/>		
5. Does the screening form include: Prior level of function? Reason for screening? Current walking abilities? Follow up recommendations?	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		

Checklist: Screening for Walking Improvement Potential (cont.)

	Yes	No	Person Responsible:	Comment:
6. Is there a process for communicating information from the screening to the rest of the staff?	<input type="checkbox"/>	<input type="checkbox"/>		
7. If the potential for walking improvement is identified during screening, is there a process to ensure that a comprehensive assessment and intervention will occur?	<input type="checkbox"/>	<input type="checkbox"/>		
8. If further assessment and intervention are not warranted, is there a process to re-screen at regular intervals?	<input type="checkbox"/>	<input type="checkbox"/>		

If any of the above elements in your process for screening walking improvement are missing:

- Choose *one* element to focus your quality improvement effort first.
- Start with the Quality Improvement Worksheet A: Identifying Areas for Improvement to collect data to investigate further.
- Follow the Quality Improvement Worksheets to implement missing element(s) and monitor regularly to determine whether implementation is successful.

If none of the above elements are missing from your facility's process for care, please continue to another checklist.

Checklist: Assessing Walking Improvement Potential

Does your facility complete a comprehensive assessment for walking improvement potential for residents who are found to have the potential for improving their walking abilities upon screening?

_____ **No.** If no, this is an area for improvement. Use this checklist and the Quality Improvement Worksheets to guide your team in implementing a process for assessment for walking improvement potential.

_____ **This is an area we are working on.** Our target date for revising our process for assessment of walking improvement potential is _____. If needed, use the Quality Improvement Worksheets to guide your improvement process.

_____ **Yes.** Please continue to the questions below.

Does your facility's assessment for walking improvement potential include the following components?

	Yes	No	Person Responsible:	Comment:
1. Is the resident's balance assessed using a standardized assessment? (e.g. Tinetti, Berg, Functional Reach)	<input type="checkbox"/>	<input type="checkbox"/>		
2. Are the resident's walking abilities assessed using a standardized assessment? (e.g. Timed Up & Go, dynamic gait index, GARS, ELGAM)	<input type="checkbox"/>	<input type="checkbox"/>		
3. Does your assessment address the following areas:				
Reason for assessment?	<input type="checkbox"/>	<input type="checkbox"/>		
Medical necessity?	<input type="checkbox"/>	<input type="checkbox"/>		
Prior level of function?	<input type="checkbox"/>	<input type="checkbox"/>		
Communication with physician?	<input type="checkbox"/>	<input type="checkbox"/>		
Medical/surgical history?	<input type="checkbox"/>	<input type="checkbox"/>		
Current diagnosis?	<input type="checkbox"/>	<input type="checkbox"/>		
Medications?	<input type="checkbox"/>	<input type="checkbox"/>		
Skilled intervention?	<input type="checkbox"/>	<input type="checkbox"/>		
Rehab potential?	<input type="checkbox"/>	<input type="checkbox"/>		
Functional/measurable goals?	<input type="checkbox"/>	<input type="checkbox"/>		
Appropriate frequency/duration?	<input type="checkbox"/>	<input type="checkbox"/>		

Checklist: Assessing Walking Improvement Potential (cont.)

	Yes	No	Person Responsible:	Comment:
4. Does your assessment address the following functional areas: Range of motion? Strength? Cognitive status? Alignment/posture? Balance? Gait? Coordination? Deformities/Amputations? Pain? Precautions? Vision?	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		
5. Does your assessment address the following external factors: Assistive devices? Prosthetics/orthotics? Environmental factors? (e.g. lighting, floors, footwear, furniture arrangement)?	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		
6. Is there a process to ensure the assessment is completed in a timely manner and filed in the appropriate locations?	<input type="checkbox"/>	<input type="checkbox"/>		
7. Is there a process to communicate the results of the assessment to ensure correct coding of the MDS and development of individual care plans?	<input type="checkbox"/>	<input type="checkbox"/>		
8. Is there a process to communicate the results of the assessment to family members (if appropriate), caregivers, and the physician?	<input type="checkbox"/>	<input type="checkbox"/>		
9. Is there a process to ensure continued intervention if recommended in the assessment?	<input type="checkbox"/>	<input type="checkbox"/>		

If any of the above elements in your process for assessing for walking improvement potential are missing:

- Choose *one* element to focus your quality improvement effort first.
- Start with the Quality Improvement Worksheet A: Identifying Areas for Improvement to collect data to investigate further.
- Follow the Quality Improvement Worksheets to implement missing element(s) and monitor regularly to determine whether implementation is successful.

If none of the above elements are missing from your facility's process for care, please continue to another checklist.

Checklist: Assessing Process for MDS Coding of Walking Ability

Does your facility have a process to code walking ability on the MDS?

_____ **No.** If no, this is an area for improvement. Use this checklist and the Quality Improvement Worksheets to guide your team in implementing a process for MDS coding for walking ability.

_____ **This is an area we are working on.** Our target date for revising our process for MDS coding of walking ability is: _____. If needed, use the Quality Improvement Worksheets to guide your improvement process.

_____ **Yes.** Please continue to the questions below.

Does your facility's process for coding the MDS for walking ability include the following components?

	Yes	No	Person Responsible:	Comment:
1. Is there a process to ensure the MDS is completed in a timely manner?	<input type="checkbox"/>	<input type="checkbox"/>		
2. Is the information contained in the MDS checked against the assessments and notes in the chart from nursing, restorative, and therapy to ensure consistency with documentation?	<input type="checkbox"/>	<input type="checkbox"/>		
3. Was information gathered from multiple sources prior to coding items G1cA and G1dA? (e.g. interviews or discussion with the resident, review of documentation)	<input type="checkbox"/>	<input type="checkbox"/>		
4. If resident performance varied from shift to shift, does the MDS capture the differences?	<input type="checkbox"/>	<input type="checkbox"/>		
5. Does therapy documentation support the coding of items G1cA and G1dA?	<input type="checkbox"/>	<input type="checkbox"/>		
6. Does C.N.A. documentation support the coding of items G1cA and G1dA?	<input type="checkbox"/>	<input type="checkbox"/>		

Checklist: Assessing Process for MDS Coding of Walking Ability (cont.)

	Yes	No	Person Responsible:	Comment:
7. Was CNA documentation consistent across all shifts for the seven-day review period?	<input type="checkbox"/>	<input type="checkbox"/>		
8. Does nursing documentation support the coding of items G1cA and G1dA?	<input type="checkbox"/>	<input type="checkbox"/>		
9. Was nursing documentation consistent across all shifts for the seven-day review period?	<input type="checkbox"/>	<input type="checkbox"/>		

If any of the above elements in your process for MDS coding of walking ability are missing:

- Choose *one* element to focus your quality improvement effort first.
- Start with the Quality Improvement Worksheet A: Identifying Areas for Improvement to collect data to investigate further.
- Follow the Quality Improvement Worksheets to implement missing element(s) and monitor regularly to determine whether implementation is successful.

If none of the above elements are missing from your facility's process for care, please continue to another checklist.

Checklist: Developing Care Plans for Walking Improvement

Does your facility have a process to develop and implement care plans for residents with the potential for walking improvement?

_____ **No.** If no, this is an area for improvement. Use this checklist and the Quality Improvement Worksheets to guide your team in implementing a process for developing care plans for walking improvement.

_____ **This is an area we are working on.** Our target date for revising our process for developing care plans for walking improvement is _____. If needed, use the Quality Improvement Worksheets to guide your improvement process.

_____ **Yes.** Please continue to the questions below.

Does your facility's process for care planning walking improvement include the following components?

	Yes	No	Person Responsible:	Comment:
1. Is the care plan updated frequently enough to reflect the most current status and plan for each resident?	<input type="checkbox"/>	<input type="checkbox"/>		
2. Is there a process to ensure all people caring for this resident are aware of the information contained in the care plan?	<input type="checkbox"/>	<input type="checkbox"/>		
3. Is there a process to ensure that all triggered items on the MDS related to walking are addressed on the care plan?	<input type="checkbox"/>	<input type="checkbox"/>		
4. Is there a process to ensure that documentation is consistent across all relevant disciplines regarding functional status, interventions, goals, and progress toward the goals stated on the care plans?	<input type="checkbox"/>	<input type="checkbox"/>		
5. Is there a process to ensure the resident and/or family was informed and involved in developing the care plan?	<input type="checkbox"/>	<input type="checkbox"/>		

Checklist: Developing Care Plans for Walking Improvement (cont.)

	Yes	No	Person Responsible:	Comment:
6. Does the care plan reflect: A problem with ambulation if the resident has had a recent decline in walking ability? (e.g. Gait deficits, impaired mobility, impaired balance) <input type="checkbox"/> Yes <input type="checkbox"/> No Appropriate short and/or long term goals for walking improvement? (e.g. Resident will improve ambulation from moderate assist to minimal assist by 30 days with verbal cues and a front wheeled walker) <input type="checkbox"/> Yes <input type="checkbox"/> No Appropriate approaches for walking improvement? (e.g. Balance exercises and lower extremity strengthening) <input type="checkbox"/> Yes <input type="checkbox"/> No Appropriate frequency and duration for the goal to be achieved? (e.g. Five days a week for 4 weeks) <input type="checkbox"/> Yes <input type="checkbox"/> No The person or discipline responsible for implementing and achieving the goal? (e.g. Physical therapy, restorative nursing) <input type="checkbox"/> Yes <input type="checkbox"/> No				
7. Is the intervention for walking improvement designed specifically for the individual resident's needs? <input type="checkbox"/> Yes <input type="checkbox"/> No				
8. Are the goals established for walking improvement measurable and resident focused? <input type="checkbox"/> Yes <input type="checkbox"/> No				

If any of the above elements in your process for developing care plans for walking improvement are missing:

- Choose *one* element to focus your quality improvement effort first.
- Start with the Quality Improvement Worksheet A: Identifying Areas for Improvement to collect data to investigate further.
- Follow the Quality Improvement Worksheets to implement missing element(s) and monitor regularly to determine whether implementation is successful.

If none of the above elements are missing from your facility's process for care, please continue to another checklist.

Checklist: Monitoring Walking Ability

Does your facility have a process for monitoring walking ability?

- _____ **No.** If no, this is an area for improvement. Use this checklist and the Quality Improvement Worksheets to guide your team in implementing a process for monitoring walking ability.
- _____ **This is an area we are working on.** Our target date for revising our process for monitoring walking ability is _____. If needed, use the Quality Improvement Worksheets to guide your improvement process.
- _____ **Yes.** Please continue to the questions below.

Does the process for monitoring walking ability include the following components?

	Yes	No	Person Responsible:	Comment:
1. Is there evidence that the interventions implemented for walking improvement are provided according to the suggested frequency and duration?	<input type="checkbox"/>	<input type="checkbox"/>		
2. Is there evidence of resident, family, and facility caregiver education regarding level of independence, programs (functional maintenance programs (FMP), restorative, exercise), safety issues, and precautions if needed?	<input type="checkbox"/>	<input type="checkbox"/>		
3. Is there a system to communicate progress to ensure correct coding and accurate reflection of the resident's walking ability on both the MDS and the care plans?	<input type="checkbox"/>	<input type="checkbox"/>		
4. Is there evidence that the goals and treatment plan for walking improvement are updated as needed?	<input type="checkbox"/>	<input type="checkbox"/>		
5. Is there documentation to reflect a weekly (or daily) Interdisciplinary Team Meeting (e.g. Medicare meeting, Restorative care meeting) to discuss the resident's progress/status regarding walking ability?	<input type="checkbox"/>	<input type="checkbox"/>		

Checklist: Monitoring Walking Ability (cont.)

	Yes	No	Person Responsible:	Comment:
6. Does the daily recording of treatment match the treatment plan on the evaluation and the physician's orders?	<input type="checkbox"/>	<input type="checkbox"/>		
7. Do the daily or weekly progress notes reflect resident's: Response to interventions? Type of intervention provided? Frequency / duration? Level of assistance required? Devices / equipment used? Progress? Refusals / cancellation? Change in status?	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		
8. Is there a system to ensure that the progress and functional status are consistently documented between all relevant disciplines?	<input type="checkbox"/>	<input type="checkbox"/>		
9. Is there a process to ensure that interventions/approaches established by rehabilitative staff are followed by CNAs during direct care (i.e., use of long-handled brushes or built-up spoons)?	<input type="checkbox"/>	<input type="checkbox"/>		
10. Is there a process for obtaining nursing referrals, revising care plans, and/or educating caregivers if a resident falls or declines in status?	<input type="checkbox"/>	<input type="checkbox"/>		
11. Is documentation consistent among disciplines regarding discharge planning, discharge disposition, family involvement, resident's goals, and appropriateness of community resource involvement to ensure success after discharge?	<input type="checkbox"/>	<input type="checkbox"/>		

Checklist: Monitoring Walking Ability (cont.)

	Yes	No	Person Responsible:	Comment:
12. Does the therapy department formulate restorative programs, functional maintenance programs, or home exercise programs to ensure maintenance or improvement of progress achieved during therapy?	<input type="checkbox"/>	<input type="checkbox"/>		
13. Is a home evaluation provided if appropriate before the resident returns home?	<input type="checkbox"/>	<input type="checkbox"/>		

If any of the above elements in your process for monitoring walking ability are missing:

- Choose *one* element to focus your quality improvement effort first.
- Start with the Quality Improvement Worksheet A: Identifying Areas for Improvement to collect data to investigate further.
- Follow the Quality Improvement Worksheets to implement missing element(s) and monitor regularly to determine whether implementation is successful.

If none of the above elements are missing from your facility's process for care, please continue to another checklist.

Checklist: Policy and Procedures for Maintaining and/or Improving Walking Ability

Does your facility have a policy and procedure for maintaining and/or improving the walking ability of residents?

_____ **No.** If no, this is an area for improvement. Use this checklist and the Quality Improvement Worksheets to guide your team in implementing a policy and procedure for maintaining and/or improving the walking ability of residents.

_____ **This is an area we are working on.** Our target date for revising our policy and procedure for maintaining and/or improving the walking ability of residents is _____. If needed, use the Quality Improvement Worksheets to guide your improvement process.

_____ **Yes.** Please continue to the questions below.

Does your facility's policy and procedure for maintaining and/or improving the walking ability of residents include the following components?

	Yes	No	Person Responsible:	Comment:
1. Does the policy and procedure reflect the recommendations of interdisciplinary team members in its approaches?	<input type="checkbox"/>	<input type="checkbox"/>		
2. Does the policy and procedure include information on roles and responsibilities of each team member?	<input type="checkbox"/>	<input type="checkbox"/>		
3. Is there evidence that relevant caregivers were trained on the policy and procedure?	<input type="checkbox"/>	<input type="checkbox"/>		
4. Does the policy and procedure include a statement about the purpose or goal of the program?	<input type="checkbox"/>	<input type="checkbox"/>		
5. Does the policy and procedure include guidelines for the appropriateness of admission into the program?	<input type="checkbox"/>	<input type="checkbox"/>		
6. Does the policy and procedure include information on admission procedures, assessments, care plans, or documentation?	<input type="checkbox"/>	<input type="checkbox"/>		

Checklist: Policy and Procedures for Maintaining and/or Improving Walking Ability (cont.)

	Yes	No	Person Responsible:	Comment:
7. Does the policy and procedure include information on approaches or program development for restorative and/or therapies? (e.g. appropriateness of referral, continuation of services, discharge)	<input type="checkbox"/>	<input type="checkbox"/>		
8. Does the policy and procedure include information on ambulation programs? (e.g. gait belts, assistive devices, transfers, body mechanics)	<input type="checkbox"/>	<input type="checkbox"/>		
9. Does the policy and procedure include instructions for completing required documentation?	<input type="checkbox"/>	<input type="checkbox"/>		
10. Does your policy and procedure include when and how the care plan will be developed and implemented?	<input type="checkbox"/>	<input type="checkbox"/>		
11. Does the policy and procedure address how to include the resident's and/or family's goals in resident care?	<input type="checkbox"/>	<input type="checkbox"/>		
12. Does the policy and procedure address discharge plans and functional outcomes of the program, and how to measure functional outcomes?	<input type="checkbox"/>	<input type="checkbox"/>		
13. Does the policy and procedure offer suggestions on altering, monitoring, and evaluating the program?	<input type="checkbox"/>	<input type="checkbox"/>		

If any of the above elements in your policy and procedures for maintaining and/or improving walking ability are missing:

- Choose *one* element to focus your quality improvement effort first.
- Start with the Quality Improvement Worksheet A: Identifying Areas for Improvement to collect data to investigate further.
- Follow the Quality Improvement Worksheets to implement missing element(s) and monitor regularly to determine whether implementation is successful.

If none of the above elements are missing from your facility's process for care, please continue to another checklist.

Checklist: Staff Training & Education for Maintaining and/or Improving Walking Ability

Does your facility have an initial and ongoing education for all relevant caregivers related to maintaining and/or improving walking ability?

_____ **No.** If no, this is an area for improvement. Use this checklist and the Quality Improvement Worksheets to improve your process for education and training on topics related to maintaining and/or improving walking ability.

_____ **This is an area we are working on.** Our target date for revising our process for educating staff regarding maintaining and/or improving walking ability is _____. If needed, use the Quality Improvement Worksheets to guide your improvement process.

_____ **Yes.** Please continue to the questions below.

Does your facility's education program for maintaining and/or improving walking ability include the following components?

	Yes	No	Person Responsible:	Comment:
1. Are new employees educated on current specialized programs for ambulation? (e.g. park and walk, restorative, functional maintenance)	<input type="checkbox"/>	<input type="checkbox"/>		
2. Do the education materials cover information on admission procedures, including assessments, MDS, referrals, and care plans?	<input type="checkbox"/>	<input type="checkbox"/>		
3. Does the education include staff training on how to document the following components related to walking ability: Distance? Assistive devices? Level of assistance? Frequency / duration? Resident's response to interventions?	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		
4. Are there in-services to address aspects of walking ability at least quarterly?	<input type="checkbox"/>	<input type="checkbox"/>		

Checklist: Staff Training & Education for Maintaining and/or Improving Walking Ability (cont.)

	Yes	No	Person Responsible:	Comment:
5. Does education for maintaining and/or improving walking ability address the following: Gait training? Transfer training? Gait belt utilization? Motivating the elderly? Environmental considerations? Assistive devices / equipment? Precautions and weight bearing status?	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		
6. Are employees educated on the types of medications that may have an effect on walking performance?	<input type="checkbox"/>	<input type="checkbox"/>		
7. Is the education provided at the appropriate level for the learner? (e.g. CNA vs. RN)	<input type="checkbox"/>	<input type="checkbox"/>		
8. Is there documentation that reflects staff training and understanding of roles and responsibilities of maintenance and/or walking improvement programs?	<input type="checkbox"/>	<input type="checkbox"/>		
9. Are new employees educated on facility policies and procedures for maintaining and/or improving walking ability?	<input type="checkbox"/>	<input type="checkbox"/>		
10. Are educational tools available? (e.g. videos, handouts, literature)	<input type="checkbox"/>	<input type="checkbox"/>		

If any of the above elements in your process for staff education for maintaining and/or improving walking ability are missing:

- Choose *one* element to focus your quality improvement effort first.
- Start with the Quality Improvement Worksheet A: Identifying Areas for Improvement to collect data to investigate further.
- Follow the Quality Improvement Worksheets to implement missing element(s) and monitor regularly to determine whether implementation is successful.

If none of the above elements are missing from your facility's process for care, please continue to another checklist.

