

**APPENDIX 2A**

**ORIGINAL PACE DEMONSTRATION SITES**

**A Project to Develop an Outcome-Based Continuous Quality Improvement System and  
Core Outcome and Comprehensive Assessment Data Set for PACE**

**ORIGINAL PACE DEMONSTRATION SITES**

Bienvivir Senior Health Services  
El Paso, TX

Center for Elders Independence  
Oakland, CA

Community Care for the Elderly  
Milwaukee, WI

Comprehensive Care Management  
Bronx, NY

Elder Service Plan of East Boston Neighborhood  
Health Center  
East Boston, MA

Henry Ford Center for Senior Independence  
Detroit, MI

Independent Living for Seniors  
Rochester, NY

On Lok Senior Health Services  
San Francisco, CA

Palmetto SeniorCare  
Columbia, SC

Providence ElderPlace in Portland  
Portland, OR

Sutter SeniorCare  
Sacramento, CA

Total Longterm Care  
Denver, CO

**APPENDIX 1B**

**CLINICAL PANEL, MASTER CLINICIAN REVIEW PANEL,  
AND ADVISORY COMMITTEE MEMBERS**

**A Project to Develop an Outcome-Based Continuous Quality Improvement System  
and Core Outcome and Comprehensive Assessment Data Set for PACE**

CENTERS FOR MEDICARE & MEDICAID SERVICES  
Contract No. 500-96-0004

First Clinical Panel, Spring 1998

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**A Project to Develop an Outcome-Based Continuous Quality Improvement System  
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CENTERS FOR MEDICARE & MEDICAID SERVICES  
Contract No. 500-96-0004

Second Clinical Panel, Summer 1998

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Detroit, MI

**A Project to Develop an Outcome-Based Continuous Quality Improvement System  
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CENTERS FOR MEDICARE & MEDICAID SERVICES  
Contract No. 500-96-0004

Third Clinical and Research Panel, Summer 1999

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Anne Wilkinson, PhD  
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**A Project to Develop an Outcome-Based Continuous Quality Improvement System  
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CENTERS FOR MEDICARE & MEDICAID SERVICES  
Contract No. 500-96-0004

External Clinical Panel, Spring 2000

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Center for Senior Independence  
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East Boston, MA

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El Paso, TX

James Pedulla, MD  
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East Boston, MA

Patricia Poleno, NP  
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Detroit, MI

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Milwaukee, WI

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Sacramento, CA

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Director of Quality Management  
Total Long Term Care  
Denver, CO

**A Project to Develop an Outcome-Based Continuous Quality Improvement System  
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CENTERS FOR MEDICARE & MEDICAID SERVICES  
Contract No. 500-96-0004

Fourth Clinical Panel, Spring 2000

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Columbia, SC

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Medical Director  
Total Longterm Care  
Denver, CO

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Kathryn McGuire, MS, RN  
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Rochester, NY

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East Boston, MA

**A Project to Develop an Outcome-Based Continuous Quality Improvement System  
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CENTERS FOR MEDICARE & MEDICAID SERVICES  
Contract No. 500-96-0004

Master Clinician Review, Summer 2000

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**Primary Care**

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Ronald Ford, MD  
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Caren Gould, MD  
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Harry Krulewitsch, MD  
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Wayne Lee, MD  
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Sheila Macleod, MD  
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Thomas Palmer, MD  
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Germaine Sainte-Aude, MD  
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Lyn Stromberg, MD  
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**Rehabilitation Therapy**

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Sharon Burke, PT  
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Ann Burns, PT  
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Master Clinician Review (Cont'd)

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**Rehabilitation Therapy (Cont'd)**

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Andrea Ericson, PT  
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Jan Griffith, OT  
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Sacramento, CA

Rick Rietgraft, PT  
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Anna Mazzola, PT  
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Francisca Perez, OT  
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Corinne Yuen Harrison, OT  
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**Nursing**

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Bienvivir Senior Health  
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Mary Boland, RN  
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Portland, OR

Janet Lepley, RN  
Providence Elder Place  
Portland, OR

Barbara Oches, RN  
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Columbia, SC

Susan Cavalieri, RN  
Beth Abraham Health  
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Care Management  
Bronx, NY

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Gia Osuna, RN  
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## Master Clinician Review (Cont'd)

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### Nursing (Cont'd)

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Mary Williams, RN  
Community Care for the  
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Patricia Shapiro, RN  
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Total Long Term Care  
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### Recreational Therapy

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Jeffrey Hurrell, RT  
Palmetto Senior Care  
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Master Clinician Review (Cont'd)

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**Recreational Therapy (Cont'd)**

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**Social Work**

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Care Management  
Bronx, NY

Agnes Gambale, SW  
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Bronx, NY

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CENTERS FOR MEDICARE & MEDICAID SERVICES

Contract No. 500-96-0004

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<sup>1</sup> Project Advisory Committee meetings were held in conjunction with the National PACE Association spring conferences in 1997, 1998, 1999, 2000, and 2002 and fall conferences in 1999, 2000, 2001, 2002, and 2003 (in addition to the Advisory Committee meetings included in the contract). Membership of the committee changed throughout the project due to changing roles within and outside of PACE. This list includes individuals who participated in at least one Advisory Committee meeting held during the project. A small number of additional individuals attended single meetings as guests.

## **APPENDIX 2C**

### **DATA SETS REVIEWED AND RELEVANT LITERATURE USED IN OBCQI/COCOA-B DEVELOPMENTAL WORK**

**TABLE 2C.1: Data Sets Reviewed During OBCQI/COCOA-B Developmental Work.**

5 Item IADL Screening Questionnaire (Fillenbaum 1985)	Consumer Assessment of Health Plans Study (CAHPS) Medicare Satisfaction Survey (AHCPR 1999)
15 Item Geriatric Depression Scale (SGDS) (Sheikh & Yesavage 1986)	Continuity of Care Index, GEM, VAMC Albany (Toseland et al. 1996)
48 Item Checklist of Problem Indicators for Abuse (Reis & Nahmaish 1998)	Cumulative Illness Rating Scale (Linn, Linn & Gurel 1968)
Acute Physiology Scale (Burns et al. 1995)	DataPACE (On Lok, Inc. 1993)
Adult Medicaid Managed Care Questionnaire (AHCPR 1998)	Dementia Mood Assessment (DMAS) (Sunderland et al. 1988)
Alcohol Use Disorder identification Test (AUDIT) (Babor & Grant 1989)	Direct Assessment of Functioning Scale (DAFS) (Lowenstein et al. 1989)
Antonovsky's Sense of Coherence Scale (Antonovsky 1987)	Economic Resources Assessment Scale of the Older Americans Resources and Services (OARS) Multi-dimensional Functional Assessment Questionnaire (Fillenbaum 1988)
Arthritis Impact Measurement Scale (AIMS) (Meenan et al. 1982)	Elder Abuse Screen (Fulmer & Welle 1986)
Assessment Inventory for Disposition and Evaluation for the Home Health Care Setting (AIDE) (Cason, Rhoads & Dean 1997)	Elderly At Risk Rating Scale (EARRS) (Donald 1997)
Barthel Index (Mahoney & Barthel 1965)	Environmental Checklist (Steele, Musliner & Berg 1995)
Basic and Instrumental Activities of Daily Living (BADL and IADL) (Lawton et al. 1982)	Executive Interview (Royall et al. 1993)
Beck Depression Inventory (BDI) (Beck et al. 1961)	Family Apgar (Smilkstein 1978)
Behavior Dyscontrol Scale (BDS) (Grigsby & Kaye 1996)	FICSIT Quality of Life Measure (Kutner et al. 1992)
Blaylock Risk Assessment Screen (BRASS) (Blaylock & Cason 1992)	FROMAJE Mental Status Guide (Doyle et al. 1986)
Blessed Dementia Score (Blessed, Tomlinson & Roth 1968)	Functional Activities Questionnaire (Pfeffer et al. 1984)
Braden Scale for Predicting Risk of Pressure Ulcers (Bergstrom et al. 1987)	Functional Assessment Staging of Alzheimer's Disease (FAST) (Reisberg et al. 1985)
Brief Cognitive Rating Scale (Reisberg et al. 1983)	Functional Independence Measure (FIM) (Granger et al. 1993)
Brief Psychiatric Rating Scale (Overall & Gorham 1962)	Functional Rating Scale for the Symptoms of Dementia (Hutton et al. 1985)
Brief Symptom Inventory (BSI) (Granger et al. 1995)	Functional Reach (Duncan et al. 1990)
CAGE (Mayfield, McLeod & Hall 1974)	Functional Status Questionnaire (Jette et al. 1986)
CAMDEX (Hendrie et al. 1988)	General Health Questionnaire (Goldberg 1972)
Canberra Interview for the Elderly (CIE) (Social Psychiatry Research Unit 1992)	Geriatric Depression Scale (GDS) (Yesavage & Brink 1983)
Caregiver Measurement of Burden (Hooyman et al. 1985)	Get Up and Go Test (Mathias, Nayak & Isaacs 1986)
Caregiver Quality of Life Index (CQLI) (Mohide et al. 1988)	Global Deterioration Scale (Reisberg et al. 1982)
Caregiver Strain Index (Robinson 1983)	Goal Attainment Scaling (GAS) (Kiresuk & Sherman 1968)
Center for Epidemiologic Studies-Depression (CES-D) (Radloff 1977)	Goldberg Anxiety & Depression Scale (Goldberg et al. 1988)
Charlson Comorbidity Index (Burns et al. 1995)	Hachinski Ischemic Score (Hachinski et al. 1974)
Chronic Disease Score (Clark et al. 1995)	Haycox Behavioral Scale (Haycox 1984)
Client Satisfaction Survey (Reeder & Chen 1990)	Health Perception, VA ADHC (Hedrick et al. 1993a, 1993b)
Clinical Dementia Rating Scale (CDR) (Morris 1993)	Health Plan Employer Database Information Set (HEDIS) (Corrigan & Nielson 1993)
Clock Drawing Task (Wolf-Klein et al. 1989) (Sunderland et al. 1989)	Health Status Form (HSF) (Greenberg et al. 1988)
Cognitive Capacity Screen (Kaufman et al. 1979)	Health Utilities Index Mark II (HUI:2) (Torrance et al. 1996)
Conflict Tactics Scale (revised) (Pillemer & Finkelhor 1988)	Hierarchical Assessment of Balance and Mobility (MacKnight & Rockwood 1995)
	Home Care Satisfaction Measures (HCSM) (Geron 1997)

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**TABLE 2C.1: Data Sets Reviewed During OBCQI/COCOA-B Developmental Work. (cont'd)**

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Home Safety Interview Guide and Checklist (SOCARE)	Moore Functional Dementia Scale (Moore et al. 1983)
Hospice Quality of Life Index (McMillan & Mahon 1994)	National Adult Reading Test (NART) (Nelson & O'Connell 1978)
H-VAS-Horizontal Visual Analogue Scale (Revill et al. 1976; Huskisson 1982)	Non-VA Utilization Questionnaire, GEM, VAMC Albany (Toseland et al. 1996)
Indicators of Abuse Screen (IOA) (Reis & Nahmiash 1998)	Norbeck Social Support Questionnaire (Norbeck, Lindsey & Carrieri 1981)
Informant Questionnaire on Cognitive Decline in the Elderly (IQCODE) (Jorm & Jacomb 1989)	Nottingham Extended ADLs Instrument (Nouri & Lincoln 1987)
Information-Memory-Concentration Test (IMC) (Blessed, Tomlinson & Roth 1968)	Nottingham Health Profile (Hunt et al. 1981)
Institutional Health Care Use, GEM, VAMC Albany (Toseland et al. 1996)	Number Rating Scale (NRS) (Wewers & Lowe 1990)
Jette's Functional Status Index (Jette 1980)	Numeric Rating Scale (for pain) (Kittelberger, LeBel & Borsook 1996)
Katz Index of ADLs (Katz et al. 1963)	Nursing Home Certification (NHC) (Greenlick et al. 1988)
Kokmen Short Test of Mental Status (Kokmen, Naessens & Offord 1987)	Nutrition Screening Initiative (Washington, DC)
Lawton and Brody IADL Scale (Lawton & Brody 1969)	Nutritional Risk Index (Chavez, Coulston & Foerster 1988)
London Psychogeriatric Rating Scale (LPRS) (Hersch, Csapo & Palmer 1978)	Older Americans Research and Services (OARS) (Duke University 1978a, 1978b)
Longitudinal Study on Aging (Fitti & Kovar 1987)	Older Americans Resource Service-IADL (OARS-IADL) (Fillenbaum 1985)
Lubben Social Network Scale (Lubben 1988)	Oral Health-Related Quality of Life (Kressin et al. 1996)
Mattis Dementia Rating Scale (Mattis 1976)	Orientation-Memory-Concentration Test (OMC) (Katzman et al. 1983)
McGill Pain Questionnaire (Melzack 1975)	Outcome and Assessment Information Set (OASIS) (Shaughnessy, Crisler & Schlenker 1995)
McGill Pain Scale (Granger et al. 1995)	Outpatient Geriatric Evaluation and Management (GEM), VAMC, Albany (Toseland et al. 1996)
McGill Quality of Life Questionnaire (Cohen et al. 1995)	Outpatient Geriatric Evaluation and Management (GEM), VAMC, Memphis (Burns et al. 1995)
McMaster Quality of Life Scale (Sterkenburg, King & Woodward 1996)	Outpatient Health Care Use, GEM, VAMC Albany (Toseland et al. 1996)
Medical Outcomes Study 6 item version (Sherbourne & Stewart 1991)	Pain Diary (Kittelberger, LeBel & Borsook 1996)
Medical Outcomes Study Short Form 20 (MOS SF-20) (Hedrick et al. 1991)	Pain Thermometer (PT) (Herr & Mobily 1993)
Medical Outcomes Study Short Form 36 (MOS SF-36) (Sherbourne & Stewart 1991)	Parkinson's Disease Quality of Life Questionnaire (de Boer et al. 1996)
Medical Rehabilitation Follow Along (MRFA) (Granger et al. 1995)	Patient Assessment Tool for Home Care, GEM, VAMC (Toseland et al. 1996)
Mental Status Questionnaire (MSQ) (Kahn et al. 1960)	Patient Evaluated Problem Score (Rathbone, Horsley & Goacher 1994)
Mini-Mental Status Examination (MMSE) (Folstein, Folstein & McHugh 1975)	Philadelphia Geriatric Center Morale Scale (Lawton 1975)
Minimum Data Set for Home Care (MDS-HC) (Morris et al. 1996)	Philadelphia Geriatric Center Pain Intensity Scale (Parmalee 1996)
Minimum Data Set for Post Acute Care (MDS-PAC) (Melvin 1998)	Physical Performance Test (PTT) (Reuben & Sui 1990)
Minimum Data Set I (MDS I) (Morris et al. 1990)	Physical Self-Maintenance Scale (Lawton 1971)
Minimum Data Set Plus (MDS+) (Morris et al. 1990)	Physical Signs and Symptoms Scale (PSMS) (Lawton & Brody 1969)
Modified Barthel Index (Granger, Albrecht & Hamilton 1979)	Physician Orders for Life-Sustaining Treatment (POLST) (Tolle et al. 1998)
Modified Mini-Mental Status Examination (3MS) (Lee & Chang 1987)	Problem Behaviors, VA ADHC (Hedrick et al. 1993a, 1993b)
Monroe Geriatric Community Hospital Ambulatory Consultation Services (GACS) (Williams 1987)	

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**TABLE 2C.1: Data Sets Reviewed During OBCQI/COCOA-B Developmental Work. (cont'd)**

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Psychogeriatric Dependency Rating Scale (PGDRS) (Wilkinson & Graham-White 1980)	Stokes/Gordon Stress Scale (SGSS) (Stokes & Gordon 1987)
Psychological Distress Scale VA ADHC (Hedrick et al. 1993a, 1993b)	Structured Assessment of Independent Living Skills (SAILS) (Mahurin, DeBettignies & Pirozzola 1991)
Purpose-in-Life Test (Gerwood, LeBlanc & Piazza 1998)	Structured Assessment of Independent Living Skills (SAILS) (Mahurin, DeBettignies & Pirozzola 1991)
Qualcare Scale (Phillips et al. 1990)	Support Services Questionnaire, GEM, VAMC Albany (Toseland et al. 1996)
Quality of Well-being Scale - Self Administered (QWB-SA) (Andresen et al. 1998)	Symptoms Checklist-90 (SCL-90) (Derogatis, Lipman & Covi 1973)
Quality of Well-being Scale (QWB) (Kaplan, Bush & Berry 1976)	Test of Category Fluency (Isaacs & Kennie 1973)
Reintegration to Normal Living Scale (Wood-Dauphinee et al. 1988)	Timed Up and Go (Podsiadlo & Richardson 1991)
Revised Memory and Behavior Problems Checklist (discussed in Gallo et al. 2000)	Tinetti Gait and Balance Scale (Tinetti 1986)
Rinne Test (discussed in Gallo et al. 2000)	Toolkit of Instruments to Measure End of Life Care (Center to Improve Care of the Dying 1997)
Rosow-Breslau Scale (Rosow & Breslau 1966)	Uniform Needs Assessment Instrument (UNAI) (HCFA 1992)
Sandoz Clinical Assessment Geriatric (SCAG) (Venn 1983)	VA Adult Day Health Care (ADHC) (Hedrick et al. 1993a, 1993b)
Satisfaction with Treatment Intensity and Palliation (Hanson et al. 1997)	Values History (Doukas & McCullough 1988)
Schwabach's Test (discussed in Gallo et al. 2000)	VDS-Verbal Description Scale (Melzack & Torgerson 1971)
Self-Report Medication-Taking Scale (Morisky et al. 1986)	Verbal Descriptor Scale (for pain) (Kittelberger, LeBel & Borsook 1996)
Sendra Quality of Life Index (McMillan & Mahon 1994)	Visual Analog Scale (for pain) (Harkins et al. 1994)
Short Geriatric Depression Scale (S-GDS) (Cwikel & Ritchie 1989)	V-VAS-Vertical Visual Analogue Scale (Scott & Huskisson 1979)
Short Portable Mental Status Questionnaire (Pfeiffer 1975)	Washington University Clinical Dementia Rating (Hughes et al. 1982)
Sickness Impact Profile (SIP) (Bergner et al. 1981)	Weber's Test (discussed in Gallo et al. 2000)
SMAF - Functional Autonomy Measurement System (Hebert, Carrier & Bilodeau 1988)	Williams Timed Manual Performance (Williams 1987)
Social Support Scale, VA ADHC (Hedrick et al. 1993a, 1993b)	Winchester Disability Rating Scale (Carpenter & Demopoulos 1990)
Spiritual Involvement and Beliefs Scale (Hatch et al. 1988)	Yale Battery (Lachs et al. 1990)
Spitzer Quality of Life Index (Spitzer et al. 1981)	Zarit Burden Interview (Zarit et al. 1986)
Standardized Mini-Mental Status Examination (SMMSE) (Folstein, Folstein & McHugh 1983)	

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**PACE Site Assessments and State Data Reporting Forms (Obtained in 1999)**

Independent Living for Seniors  
Rochester, NY

Kansas Department of Aging  
Topeka, KS

State of Oregon  
Department of Human Resources  
Senior and Disabled Services Division  
Salem, OR

## **APPENDIX 2D**

### **CONCEPTUAL DOMAINS USED IN OBCQI/COCOA DEVELOPMENTAL WORK**

Two separate sets of domains were used during the independent development of the draft OBCQI data set and the draft core comprehensive assessment data set, prior to integration of the two data sets into the single core outcome and comprehensive assessment (COCOA) data set. Once the two draft data sets were integrated into the COCOA data set, the two domain sets also were integrated. Table 2D.1 in this appendix delineates the sets of domains reflected in the draft OBCQI data set, draft core comprehensive assessment data set, integrated COCOA data set, and COCOA-B data set.

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**TABLE 2D.1: Conceptual Domains Used in OBCQI/COCOA Developmental Work.**

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<u>Domain</u>	<u>Outcome Indicators</u>	<u>Assessment Elements</u>	<u>Full COCOA</u>	<u>COCOA-B</u>
Functional Status	X	X	X	X
Physiologic Status & Symptom Mgmt	X	X	X	X
Emotional/Mental Health Status	X	X	X	X
Cognitive Functioning	X	X	X	X
Participant Quality of Life/Social Support	X	X	X	X
Caregiver Quality of Life	X		X	X
Home Environment/Living Arrangements		X	X	X
Participant Satisfaction	X		X	X
Caregiver Satisfaction	X		X	X
Knowledge & Adherence <sup>1</sup>	X		X	X
Utilization	X	X	X	X
End of Life	X	X	X	X

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<sup>1</sup> Outcome indicators related to participant and informal caregiver knowledge were dropped due to measurement issues identified during empirical testing. Data items to measure adherence remain in the data set.

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