Assessment of Functional Capacity Interview (AFCI)

Participant/Patient Information

Name/ID: _____ DOB: ___ /___ /____ Age: ___ Gender: ___ Today's Date: ___ /___ /___

Race/Ethnicity: ☐ African American ☐ Asian ☐ Hispanic
☐ Native American ☐ White ☐ Other: _____

Years of Education: _____

Informant Information

Informant Name/ID: _____

Relationship to the patient: ☐ Sibling ☐ Spouse / Partner ☐ Professional Caregiver
☐ Child ☐ Friend ☐ Other relative: _____
☐ Parent ☐ Other: _____

Number of years you have known the patient: _____

Nature of Contact: ☐ Live with patient ☐ Contact by phone: Frequency: ____ times/week ☐ In-person contact: Frequency: ____ times/week

Instructions: This rating scale asks about the patient's level of difficulty in performing daily life activities, across four functional domains. This scale is designed to be used as part of a clinical interview with a collateral. For each question, please rate the patient's current level of difficulty with these various activities, using the scale below. Please circle the corresponding answer for each item. If support is provided to complete the activity, rate the level of difficulty when performing the activity *without* support. Limitations attributed to physical disabilities (e.g., blindness, reduced mobility) should not be rated as a difficulty on this scale.

0 = *No difficulty*: independently, consistent with baseline level, or never did but could do/no opportunity to perform activity
1 = *Mild difficulty*: needs some cueing/supervision but can do by self
2 = *Moderate difficulty*: understands but needs verbal/physical assistance
3 = *Severe difficulty*: needs to be done for the patient or does by self but with critical errors

Financial Affairs and Management

1.	Knowledge of personal assets and financial situation	0	1	2	3
2.	Knowledge of cost of common items or services (e.g., groceries, bills, gasoline, haircut)	0	1	2	3
3.	Understanding and handling of simple financial transactions (e.g., making change, paying for items, paying bills, balancing checkbook, leaving tips)	0	1	2	3
4.	Understanding and handling of complex financial transactions and paperwork (e.g., mortgage payments, taxes and personal finances, managing investments, insurance, investments, EOBs)	0	1	2	3
5.	Awareness of scams, fraud, and risk of exploitation (e.g., providing personal information to strangers, financial exploitation by family or friends)	0	1	2	3
6.	Spending accordingly to prior habits (e.g., avoids overspending/over buying, gambling, entering contest, unjustified contribution to charities)	0	1	2	3
	Total:				

Medical Affairs and Healthcare Management

1.	Managing medications (setting up a pillbox, taking medications as prescribed, refilling prescription)	0	1	2	3
2.	Knowledge of medical conditions and their consequences (e.g., knowing symptoms of a disease, affected body part/system)	0	1	2	3
3.	Awareness of medical conditions and their impact (recognizing how is affected by a condition)	0	1	2	3
4.	Understanding of medical care and expressing preference in healthcare choices	0	1	2	3
5.	Understanding of treatment options, weighing risks/benefits of treatment options	0	1	2	3
6.	Taking proper action when not feeling well (i.e., when to call the doctor or go to hospital)	0	1	2	3
	Total:				

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Home and Personal Safety					
1.	Managing personal hygiene (bathing, grooming, changing/washing clothes, toileting, dental care)	0	1	2	3
2.	Managing nutritional needs (discarding expired food, filling up on groceries, maintaining proper caloric intake)	0	1	2	3
3.	Using appliances and household devices safely (e.g., stovetop, oven, washer dryer, remote controls, phone, TV, and other commonly use electronics)	0	1	2	3
4.	Maintaining cleanliness of living environment consistent with prior habits (e.g., housekeeping, hoarding)	0	1	2	3
5.	Responding to home emergency situations (e.g., obtaining needed services, knowing emergency numbers, responding to a small fire)	0	1	2	3
6.	Exercising judgment with personal safety (e.g., letting strangers into the house, locking the doors, avoiding outing in risky conditions, safe ambulation, using assistive device)	0	1	2	3
	Total:				

Social Behaviors and Community Functioning (based on historical personality)					
1.	Handling sensitive social situations appropriately (i.e., presence of disinhibition, impulsivity, loss of filter)	0	1	2	3
2.	Initiating activities (including at home and outside the home)	0	1	2	3
3.	Understanding and appreciating others' perspectives, show concerns for others	0	1	2	3
4.	Managing and participating in community activities (voting, religious, shopping, volunteering)	0	1	2	3
5.	Participating in hobbies, physical activities/sports, and/or occupational duties	0	1	2	3
6.	Ability to drive safely OR utilize public transportation (e.g., driving skills, reaction time, orientation, recognizing road signs, orientation behind the wheel, planning to take train/bus)	0	1	2	3
	Total:				

Assessment of Functional Capacity Interview Domain Scores	
Financial Affairs and Management	
Medical Affairs and Healthcare Management	
Home and Personal Safety	
Social Behaviors and Community Functioning	
AFCI Total Score:	