

# Rapid Review of Caregiver Screening and Assessment tools

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# Review Methodology

Screening and assessment tools shortlisted after consulting:

- Initial review conducted by OCO
- The Change Foundation's "Changing CARE's Caregiver Assessment Coordinating Group" resources (2017)
- Parmar & Sacrey (2017). Screening for Stress and Burden in Caregivers of Seniors. Covenant Health Network of Excellence in Seniors' Health and Wellness

# Criteria

9 Screening tools and 11 Assessment tools reviewed using the following criteria:

- Classification/scoring
- Setting(s)
- Time of administration
- Expertise required
- Domains covered
- Pros
- Cons

# Domains

Cover:

- needs to support caregiver's own well-being
- needs related to their caregiving role
- Socio-demographic factors impacting client & caregiver outcomes



*\*Language barriers, financial barriers, barriers to care/services due to geography, gender, race, and other social factors*



# Shortlisted Tools

# Key Insights

- First round shortlisted 6 screening and 6 assessment tools
- Majority:
  - Self-administered
  - Time of admin  $\leq$  10 - 15min
  - Implemented across various settings
  - Did not satisfy all domains
- Second round of review conducted to further shortlist tools. Additional filtering done after considering ease-of-**access**, ease-of-**implementation**, ease-of-**use** (such as, scoring cut-offs to guide decisions, etc.) and **cost** considerations
- 12 Screening & Assessment tools further shortlisted to identify top 3 tools for each

# Key Insights

- The screening and assessment tools were very similar in scope:
  - Assessment tools do not provide that much further understanding of the caregivers' well-being
  - A fulsome assessment by trained professionals may still be required
  - A decision to identify **top 3** from the remaining 6 was made

# Equity

- Nearly all tools lack reference to health equity outcomes or considerations
- Do not account for the social determinants of health and how they impact caregiver well-being and recipient care, therefore some initial questions for consideration have been identified:
  - **What is the caregiver's access to formal services and means?** (food security, transportation, medical services, financial stability)
  - **What are their social supports and access to community?** (community, cultural perspectives/commonality, connection, language)
  - **Impact of the social determinants of health on both the care recipient and caregiver** (barriers to healthcare services due to language, geography, race, gender, education, etc.)

<http://torontohealthequity.ca/wp-content/uploads/2017/05/We-Ask-Because-We-Care-Report.pdf>

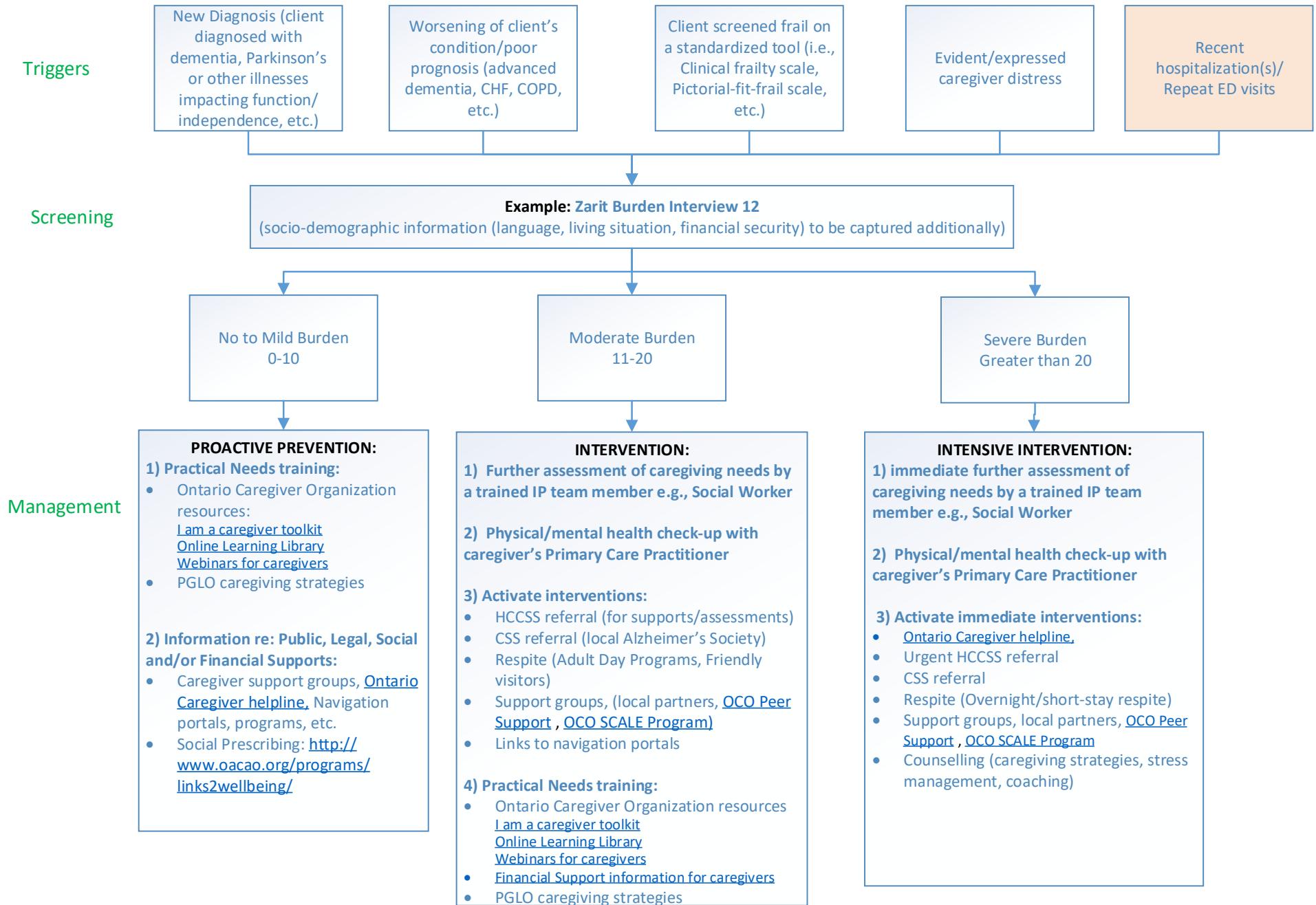


Tools (top 3)	Settings	Expertise required	Time of admin	Domains covered	Comments
<p><b>Caregiver Health Self-Assessment Questionnaire</b></p> <p>18-item, (16 Yes, No, 2 rating) caregiver self-report measure means of helping physicians assess the stress-levels of family caregivers accompanying chronically ill older adult patients to their medical visits.</p> <p><a href="https://www.healthinaging.org/tools-and-tips/caregiver-self-assessment-questionnaire">https://www.healthinaging.org/tools-and-tips/caregiver-self-assessment-questionnaire</a></p>	Multiple, Clinical, Community	Public, Self-Administered	10-15 min	<ul style="list-style-type: none"> <li>Mental and Physical Health</li> <li>Caregiving coping resilience</li> <li>Social support and connections (2 questions)</li> <li>Practical needs (1 question as it relates to work)</li> <li>Equity (living arrangement)</li> </ul>	<ul style="list-style-type: none"> <li>Developed by American Medical Association</li> <li>No training required</li> <li>Available on-line with embedded scoring</li> <li>May be a valid instrument for assessing caregiver depression</li> <li>Includes a list of resources/websites that can be customized to Canadian context</li> <li>Available in Spanish, Greek, Russian, Nepali, Italian</li> </ul>
<p><b>The Modified Caregiver Strain Index (MCSI)</b></p> <p>The tool is a 13 question Likert questionnaire that measures strain related to care provision for long-term caregivers. The higher the score, the higher the level of caregiver strain</p> <p><a href="https://www.sralab.org/sites/default/files/2017-07/issue-14.pdf">https://www.sralab.org/sites/default/files/2017-07/issue-14.pdf</a></p>	Multiple	Public; self-administered	5-10 min	<ul style="list-style-type: none"> <li>Mental and Physical Health</li> <li>Caregiving coping and resilience</li> <li>Social Support and Connections</li> <li>Practical Needs</li> </ul>	<ul style="list-style-type: none"> <li>Has been translated into Chinese</li> <li>No cut off scores</li> <li>Professional judgment is still needed to evaluate the level of caregiver strain and further assessment/intervention</li> </ul>
<p><b>Zarit Burden Interview 12 (2001)</b></p> <p>Short form ZBI-12 validated as screening tool in advanced illness including dementia and cancer.</p> <p><a href="https://www.oncozine.com/wp-content/uploads/2018/11/ZBI-12_Form.pdf">https://www.oncozine.com/wp-content/uploads/2018/11/ZBI-12_Form.pdf</a></p>	Multiple including community and SGS	Public; self-administered	5-10 min	<ul style="list-style-type: none"> <li>Mental and Physical Health</li> <li>Caregiving coping and resilience</li> <li>Social Support and Connections</li> </ul>	<ul style="list-style-type: none"> <li>Copyrighted, but available for free use by clinicians and for non-funded academic research</li> <li>Scoring cut offs to guide decision making</li> <li>Further assessment to attain a better understanding of the needs likely required</li> </ul>



Decision-tree

## Primary Care Setting (team based settings, FHTs, CHCs, etc.)



# Next Steps

- OCAW feedback
- Validate/Test with OHTs (early adopters)

# Appendix

Tools (others for consideration)	Settings	Expertise required	Time of admin	Domains Covered	Comments
<p><b>Caregiver Risk Screen</b></p> <p>The Instrument contains 12 items scored from 0 (totally disagree) to 3 (totally agree). Developed as part of national research study for homecare intake.</p> <p><a href="https://seniorsocialisolation.ca/wp-content/uploads/2018/12/CaregiverRiskScreenEnglish.pdf">https://seniorsocialisolation.ca/wp-content/uploads/2018/12/CaregiverRiskScreenEnglish.pdf</a></p>	Home care	Designed to be administered by intake workers	10-15 min	<ul style="list-style-type: none"> <li>Mental and Physical Health</li> <li>Caregiving coping and resilience</li> <li>Social Support and Connections</li> <li>Equity (partial, initial questions)</li> </ul>	<ul style="list-style-type: none"> <li>Specific questions, introduction designed to ‘understand the caregiving experience’</li> <li>Select question may not be regarded appropriate by/for caregivers from those cultural/social backgrounds where caregiving is a regarded as a social expectation</li> </ul>
<p><b>Zarit Burden Interview</b></p> <p>22 Likert-scale (5 ratings) questions. Scores are added.</p> <p><a href="https://kabc.org/wp-content/uploads/2019/05/Caregiver-Burden-Self-Assessment.pdf">https://kabc.org/wp-content/uploads/2019/05/Caregiver-Burden-Self-Assessment.pdf</a></p>	Multiple, Clinical Community	Clinical and Public self-administered,	15 min	<ul style="list-style-type: none"> <li>Mental and Physical Health</li> <li>Caregiving coping and resilience</li> <li>Social Support and Connections</li> <li>Equity (partial)</li> </ul>	<ul style="list-style-type: none"> <li>No training required</li> <li>Scoring-cut offs to guide decision-making</li> <li>Select question may not be regarded appropriate by/for caregivers from those cultural/social backgrounds where caregiving is a regarded as a social expectation. May evoke negative feelings</li> <li>Longer tool</li> </ul>
<p><b>Caregiver Burden Inventory</b></p> <p>Measure caregiver burden as it relates to time, developmental comparison with peers, physical health, social relationships, and emotional health. Can be used with informal caregivers of any sick or elderly person. 24 item scale, Scoring Score</p>	Multiple, Clinical Community	Self-report or clinician delivered questionnaire No training	10-15 min	<ul style="list-style-type: none"> <li>Mental and Physical Health</li> <li>Caregiving coping resilience</li> <li>Practical needs</li> </ul>	<ul style="list-style-type: none"> <li>Easy to use</li> <li>Available in English and Chinese</li> <li>Select question may not be regarded appropriate by/for caregivers from those cultural/social backgrounds where caregiving</li> </ul>