

Assessment Interview

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AgrAbility Agricultural Engineer



Objectives

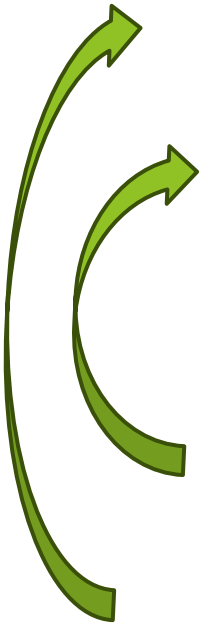
- ▶ How to build rapport and trust with the farmer for the interview.
- ▶ Understand different motivations for farming and business models.
- ▶ Understand the farmer medical conditions, history, and prognosis



The Service Delivery Cycle

▶ Referral. Finding appropriate referral candidates for AT interventions by phone interview

- ▶ AT Assessment and evaluation of farm site with rehabilitation professionals
- ▶ Make a plan listing outcome measures and recommending AT interventions
- ▶ Implement the plan with the farmer, funders, AT suppliers, fabricators
- ▶ Follow-up to make sure AT is functioning as intended and outcome measures are met
- ▶ Follow along to revisit steps 2,3,4 as needed



OPENING THE DISABILITY CONVERSATION

WITH SOMEONE

*WHO DOESN'T EVEN THINK THEY NEED
HELP, LET ALONE HAVE A DISABILITY!*

IN 3 STEPS





STEP 1:

A CHATTY VISIT ABOUT THE FARMING OPERATION.

MOST FARMERS LIKE TO TALK ABOUT THEIR FARM AND ITS OPERATION





STEP 2:

A CHATTY VISIT ABOUT WHAT HURTS. MOST FARMERS WILL ADMIT SOMETHING HURTS...

*I SEE YOU'RE LIMPING...?
DOES IT HURT WHEN YOU...?*



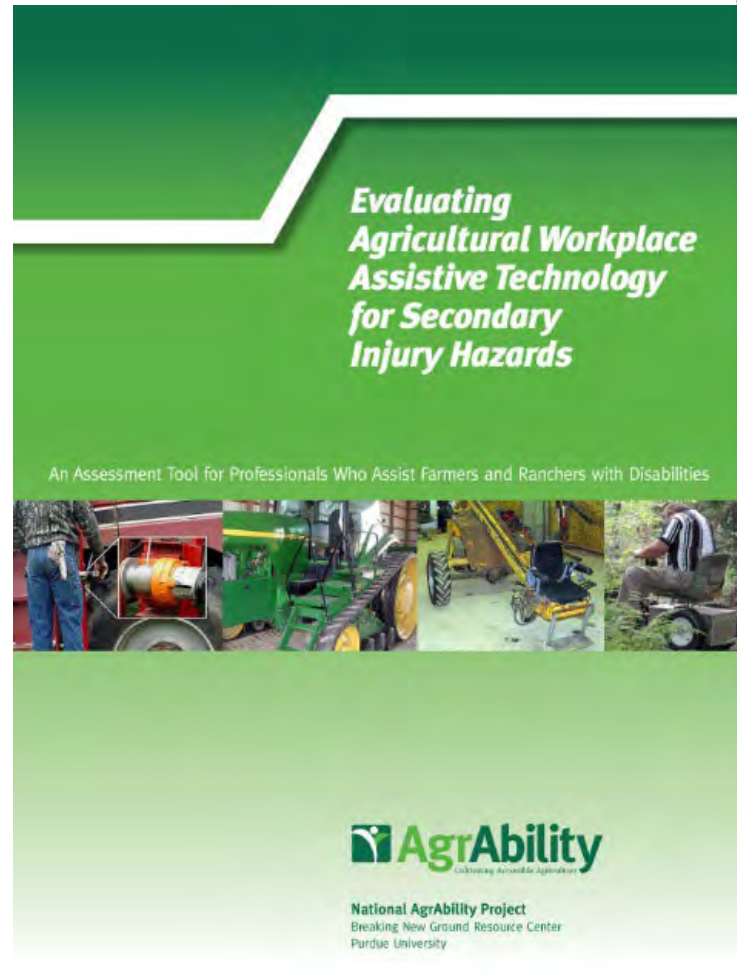
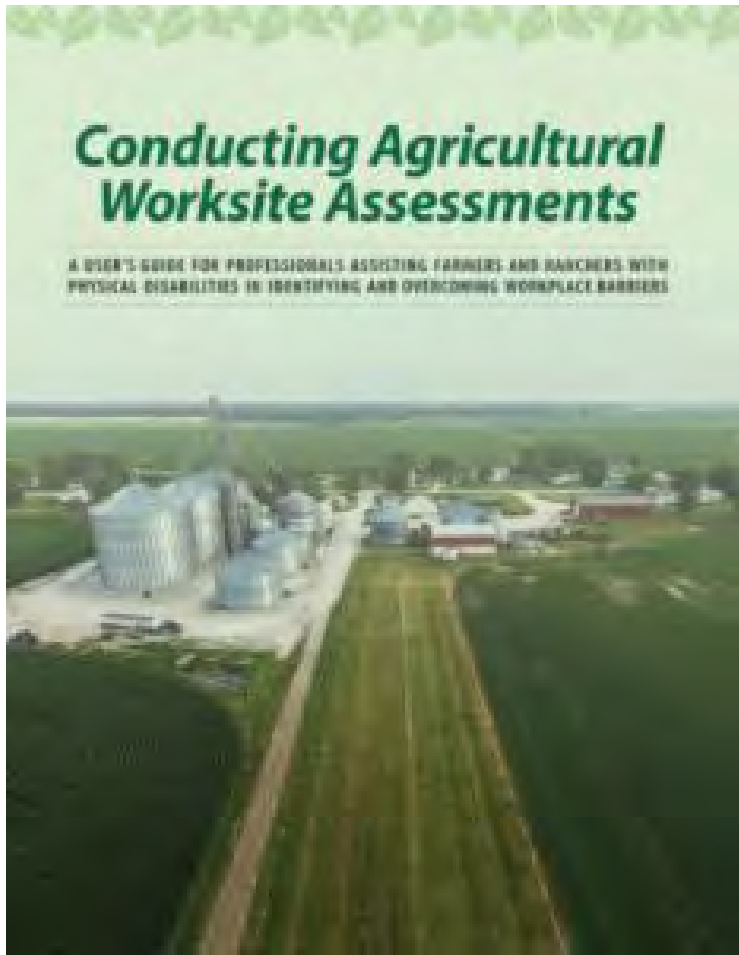
STEP 3:

CONNECT THE DOTS

OH, THAT MUST MAKE IT HARD TO... (LIFT YOUR LEG). AN EXTRA STEP ON THE BOTTOM OF THE TRACTOR COULD REDUCE STRAIN. WHO WOULD DO YOUR CHORES IF YOU FELL AND GOT HURT WORSE?



Worksite AT Assessment Tool: use it Human, Context, Activity



Worksite Assessment Tool

- ▶ Who is it for?
 - ▶ Professionals
 - ▶ “Textbook” for new staff
 - ▶ Step-by-step approach
 - ▶ Designed to cover all the bases
 - ▶ “Playbook” for experienced staff
 - ▶ Improve assessment effectiveness
 - ▶ New angles, ideas



Referral: Quantitative and Objective

1. Tell me about your Farm.

- ▶ Listen closely and write fast! Fewer questions needed.
- ▶ Listen for farm history & goals (viable farm or hobby)
- ▶ Who else is helping?

2. AgrAbility is...tell who you are you and your services

3. What tasks are difficult to accomplish. Why?

- ▶ Listen to hear the farmer's tasks and goals
- ▶ Self reporting of medical conditions

4. Gently ask about medical comments & advice.

- ▶ Time frames, chronic or acute
- ▶ Improving, stable or worsening
- ▶ Restrictions

**EVERYONE
CAN DO
THIS!**



NON-QUESTION Information

Qualitative & Subjective

Tone of voice.

(Tired, desperate, exasperated, sheepish)

Who is calling.

- ▶ Farmer
- ▶ Caregiver
- ▶ Concerned neighbor

If not the farmer, *why not?*



Mary Brown: Client Case Study

- ▶ Name changed for privacy
 - ▶ Step-by-step approach
 - ▶ More examples in worksite assessment tool
- ▶ Medical conditions changed for privacy
 - ▶ Same functional limitations
 - ▶ Same recommendations



- 8/10/23 NS New referral from MSUE. She is young commercial beekeeper with disability needing evaluation in Shelby County.
- 8/14/23 NS Phone call. Brown was referred on 8/10 and she is a beekeeper with disability. Brown and her husband 240 hives of her own with no lift system - all by hand - deeps weigh 70 to 100 pounds - pull honey by hand - 30 to 40 pounds and stack on flatbed truck - extracting by hand in shed - lifting buckets of honey 60 lb plus - checking hives etc... - cannot hire people at going rates of \$16 to \$18 per hour - pull 5000 pounds of honey per day - place 30 boxes on a pallet and work through it - need to pull honey and extract all through the harvest - building cannot hold all the supers 12x20 shed - standing at uncapping table constantly. File schedule C as LLC and keep books. Her goal is to have this be full time work to earn a living. She will continue working for Greg because she gets so many services from him also in return - shipping hives to Alabama and to almond groves, etc... Honey goes to 40 craft shows plus 3 farmers markets a week. He is very mechanical - he could install lift gate on truck which is her next purchase plan. I have a lift gate for other beekeeper but he does not want it. She will stop to see it and I will visit her apiary on Wednesday.



Assessment tool
appendix 1 page 128.

Quantitative, objective
data.

Take notes on voluntary
information.

Listen for farmer's goals.

FIGURE 1 Example of a Completed Agricultural Worksite Assessment Tool

(Client with a T 1/2
Spinal Cord Injury)

**Agricultural Worksite Assessment Tool for
Farmers and Ranchers with Physical Disabilities**

Completed by: Tony Knight Date: January 15, XXXX

I. PERSONAL DATA
A. About the client

Name: Frank D. Farmer (Age 43) Personal Identification Number: XXX-XX-XXXX Sex: M
Address: 4131 North CR 450 West County: Tippecanoe
City/State/Zip: Wallstown, IN 46999 Date of birth: 7 / 13 / XX
Phone: 260-555-1644 Cell Phone: None Fax: None
E-mail: fdf1092@starburst.net

Directions to farm/ranch: SR 164 north to SR 17. Right on SR 17 about 2 miles to CR 1150. Right on CR 1150 about 1.5 miles to CR 450. Left on CR 450 to first farmstead on left. (Name and number on mailbox)

Marital status: Married Name of spouse: Florence
Names and ages of children at home: Jeffrey, 18 - Brittany, 15 - Alexis, 13

Occupation:
 Full-time farmer/rancher
 Part-time farmer/rancher with primary income from farm/ranch
 Part-time farmer/rancher with primary income from off-farm/ranch job
Off farm job title _____
 Farm spouse
 Child dependent of farm/ranch family Adult dependent of farm/ranch family
 Farm/ranch employee
 Migrant worker Seasonal Worker
Agricultural business (type): _____
Other: _____



FIGURE 1

B. About client's disability

1. Type of disability: T 1/2 (spinal cord injury) Date of injury/diagnosis: 9 / 2 / XX

2. Describe cause of disability: Diving/swimming accident at private lake.

3. List any secondary disabilities: COVID positive

4. Functional limitations as described by client and/or referral source. (Include exact measurements if known—e.g., Db of hearing loss; visual acuity; lifting limits; range of motion; specific limitations on standing, sitting, transferring, carrying, walking, bending, stooping, balance, etc.)
Paralyzed from the chest down. Good hand function. Can't endure long exposure to hot and cold weather conditions. Pressure sores have been a problem. Good trunk stability but has lifting limitation. Can transfer to and from bed independently. Uses power wheelchair but also has manual wheelchair. Has a valid driver's license.

5. Type of medical insurance (e.g., Medicare, Medicaid, Medicare supplement, ACR Exchange, employer provided, or other commercial policy):
Medicaid

Appropriate referral questions. Ask questions about medical comments without prying too much.

II. GENERAL FARM/RANCH DATA

A. Type and size of operation (Total acreage: 900 acres)

Dairy head Grains/Raw crops (types/acres): Corn/soybean - 800 acres

Hogs 500 head Forages (types/acres): Hay/pasture - 60 acres

Beef 100 head Specialty crops (types/acres):

Sheep head Agri-business (type):

Poultry flock Agro-tourism/Direct marketing:

Other head Other:

B. Client farm/ranch responsibilities prior to disability All aspects of an owner/operator. Fed out 80 feeder cattle. Sold 20 4-H Club calves and 450 feeder pigs. Ground and mixed all feed. Did the field work (e.g., planting, harvesting, haying). Mixed and applied the chemicals and fertilizer. Maintained equipment and buildings. Did the record-keeping, purchasing, and marketing.

FIGURE 1

C. Family members and others who assist on farm/ranch

Name	Relationship	Age	Responsibilities
<u>Florence</u>	<u>Wife</u>	<u>37</u>	<u>Household/garden/record-keeping</u>
<u>Jeffrey</u>	<u>Son</u>	<u>18</u>	<u>Feeding/field work</u>
<u>Brittany</u>	<u>Daughter</u>	<u>15</u>	<u>Feeding/household/garden</u>
<u>Alexis</u>	<u>Daughter</u>	<u>13</u>	<u>Household/garden</u>
<u>Chuck/Jerry</u>	<u>Neighbors</u>	<u>52/60</u>	<u>Equipment repair</u>

IS THIS REFERRAL APPROPRIATE?

IF YOU CAN HELP, THEN CONTINUE
THE CONVERSATION OR SCHEDULE
ANOTHER MEETING TIME

*IF YOU CANNOT HELP, THEN REFER TO
SOMEONE WHO CAN*



Who can help us with information resources?

- ▶ For agriculture-specific commercial and DIY AT, emerging technologies, appropriate service providers, and training opportunities stay in touch with National AgrAbility social media and www.AgrAbility.org
- ▶ For general disability-relevant policies and regulations, advocacy and training opportunities contact your Center for Independent Living <https://www.ilru.org/projects/cil-net/cil-center-and-association-directory>
- ▶ For general commercial AT, emerging technologies, and relevant AT research contact your state AT Act Program <https://ataporg.org/>
- ▶ For job accommodations www.askJan.org
- ▶ Beware homesteader videos on youtube!!!



The Service Delivery Cycle: Assessment

- ▶ Referral finding appropriate candidates for AT interventions by phone interview
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Step 1: Gather information by interview

Gather information building on referral: remember the human, context, activity

- ▶ I care about you and want to understand so I can provide good services. I'm not an interrogator.
- ▶ Listen.
- ▶ **Use the assessment tool** to interview the consumer *and* team. Only ask what you cannot observe and photograph.
- ▶ Listen.
- ▶ Take notes, beware the laptop wall
- ▶ Listen.

**Everyone
can do this!**



The AT Assessment: it's a puzzle and we're looking for all the pieces. An OT in a Bismarck, ND clinic can do this for a farmer. So can a seed salesman.



First site visit or in-depth continuation of referral conversation

A. INTAKE INFORMATION		1st Contact Date:	8/10/2023
		Case closed Date:	
Name & Mailing Address		County:	Shelby
		Phone:	
		Mobile:	
		Fax:	
Mary Brown		E-mail:	
New Case?	yes	On-site Suvey by:	NS
Date:		Date:	8/14/2023
Heard about u	word of mouth		
Sex:	female	DOB:	8/19/2000
Marital status:	married	Name of spouse:	Mark
Veteran?		4-H/FFA?	
	Ages of children at home:		none
Education?			
Income before/after?			
Work Status:	full time owner	Type of Agriculture:	beekeeping
Farm Business Description:			
Brown has 230 hives of her own with no lift system – all by hand – deeps weigh 70 to 100 pounds – pull honey by hand – 30 to 40 pounds and stack on flatbed truck – extracting by hand in shed – lifting buckets of honey 60 lb plus – checking hives etc... - cannot hire people at going rates of \$16 to \$18 per hour – pull 5000 pounds			

- ▶ Excel spreadsheet.
- ▶ Case management software.
- ▶ Paper notes and files.
- ▶ Beware typing into a laptop during an in-person interview.



Casenotes

1. Brief notes of how the farmer was served that day.
2. Don't get behind - daily is ideal, definitely within a week
3. Help your memory and document services.

Clipboard		Font		Alignment		Number		Styles	
✖ ✔ fx									
A	B	C	D				E	F	
Name/Project	Date		Activity/Recommendations/Inquiry				Total Time Spent	Next action date	
			will visit her Sunfield apiary on Wednesday.						
Brown	8/16/23	NS	Site visit. She wants to work with rehabilitation services and I will find out who the rehab counselor is in her area. Her dad has 3 fused disc's 2 bad knees heart issues and sells produce to farmers market with 30 lb lift restrictions and 4.5 acres of gardens . Hive lifter from Poland would help doing inspections. She needs pallet jack and tailgate lift and concrete by barn to move pallets. Her lower back feels pain most but hip is the problem on right side. Recommend fold-out table, fold-down ladder on truck for climbing on and off, but it cannot interfere with the trailer or stacking hives on the bed.				1.9	done	
Brown	8/17/23	NS	Complete application and send it to MRS via email and they will start the process.				0.3	done	

First site visit or in-depth phone interview

1. Build rapport. Talk about the farm history and dreams and any shared interest you can find. Give it time. Listen.
2. Be conversational. Don't push into private topics until necessary and a trusting relationship is built. Taxes, income, social security numbers, etc...
3. Ask about the farmer's role on the farm before and after the disability. What tasks are most limited? Listen.
4. We only need to know medical restrictions and functional limitations to guide our AT recommendations. This is not research or for curiosity. Who is on the farmer's team? Listen.
5. Plan a time for an onsite farm assessment and agree on which team members should be present. Listen.



Case study: Gather information

This first site visit I was simply chatting with Mary as she worked. She told me about her tractor roll over back injury and crushed vertebrae L1-5 that are not healing correctly after 3 surgeries, and she needs another. It affects her left leg and back. How many times a day do you need to climb into that truck? She works mostly alone, but her extended family is very supportive. Are you safe in this job? How do you make money? What are *your* critical tasks? Do you like this work? Direct marketing is essential. I referred her to vocational rehabilitation services.





Case study: Gather information

Bending down to lift hives is really hard on her back. Her doctors told her she cannot be a beekeeper. She told them that's not an option. She will find a way. She loves selling honey to the public and talking about bees. She sold over \$30,000 of honey last year. We talked about hive lifters, truck tailgate lifts, and little tables for back-saving.



Case study: Gather information

In her glory! The second site visit was focused on selling honey. I learned her team includes her husband, mother, father, grandparents, a friend to work at shows with her, two surgeons, and now a vocational rehabilitation counselor and an ATP (me). She has terrible ergonomics loading and moving into shows which hurts for days. Someone usually helps her.



The ATeam: Farmer CEO

The **farmer** is the CEO of the team to select appropriate AT

- ▶ Caregivers and family, pastor, counselor
- ▶ ATP is like the service coordinator/planner - COO
- ▶ Multiple skill sets and perspectives for a common goal
- ▶ Coworkers, neighbors, ag extension agents, sales people
- ▶ Medical services, OT/PT
- ▶ ATP, RET, VR counselor, funding agency
- ▶ AT supplier, fabricator
- ▶ Another ATP with a specialty - seating and positioning, electronic aids to daily living, low vision aids, etc...



The ATeam: ATP

Assistive Technology Professional Certification

ATP role

- ▶ Referral and intake (*ag professionals*)
- ▶ AT assessments & evaluation (*ag professionals with training*)
- ▶ AT recommendations & planning
- ▶ AT implementation & training
- ▶ Follow-up and long-term follow along (*ag professionals*)



The ATeam: AT Supplier

AT supplier or fabricator's role:

- ▶ Product attributes
- ▶ Price quotes with various options
- ▶ Delivery and set up
- ▶ Operating, safety, and maintenance instructions
- ▶ Warranty
- ▶ Follow the lead of the ATP



The ATeam: www.RESNA.org Rehabilitation Engineering & AT Society of North America



The Assistive Technology Certification (ATP) recognizes demonstrated competence in analyzing the needs of consumers with disabilities, assisting in the selection of appropriate assistive technology for the consumer's needs, and providing training in the use of the selected device(s).

- ▶ Internationally recognized credibility
- ▶ AT fundamentals and training courses
- ▶ Continuing education opportunities



The ATeam: ATP

Assistive Technology Professional Certification

Degree	AT Training Education	Work Experience	ATP Exam	Continuing Education
Master's Degree or Higher in Special Education		1000 hours in 6 years**	pass	10 hr/year
Master's Degree or Higher in Rehab Science		1000 hours in 6 years**	pass	10 hr/year
Bachelor's Degree in Special Education		1500 hours in 6 years**	pass	10 hr/year
Bachelor's Degree in Rehab Science		1500 hours in 6 years**	pass	10 hr/year
Bachelor's Degree in Non-Rehab Science	10 hours*	2000 hours in 6 years**	pass	10 hr/year
Associate Degree Rehab Science		3000 hours in 6 years**	pass	10 hr/year
Associate Degree Non-Rehab Science	20 hours*	4000 hours in 6 years**	pass	10 hr/year
HS diploma or GED	30 hours*	6000 hours in 10 years**	pass	10 hr/year



www.RESNA.org³¹



Vocational rehabilitation counselor interview

- ATP Certification necessary
- Actual farm income data required from W-2 pay stubs or IRS schedule F
- Actual medical records provided by doctors and rehabilitation services.
- Activity essential for Mary to do independently for business success
- Is the business viable? Legal or regulatory challenges?
- 2 to 3 hours on site with VR counselor
- Serious discussion about realistic goals compared to medical conditions and business viability



Questions

- Ask the caregivers and co-workers for their thoughts.
- Enthusiasm for certain parts of the operation?
- Is farmer attempting to earn a living, earn some extra cash, break even on a hobby, improve mental health?
- How long does farmer plan/hope to continue the operation (until I die, 10 yrs, 2 yrs, until I'm out of debt and can sell this place)
- How much the farmer relies on other's help on the farm



More Questions

- Review actual medical documentation and other records. Quantitative objective data. Range of motion, lift restrictions.
- Ask more detailed medical questions, actual diagnosis, prognosis and medical advice. Physical abilities. Strength. Endurance. Coordination. Pain.
- Cognitive and speech abilities. Attention span, problem solving, memory, judgement.
- Hearing Issues? Vision Issues? Sensory Issues?
- Stress? Mental illness? Quality of life.



More questions

- Who else is on your team? Family, friend, pastor, welding shop, neighbor, Medicare caregiver, PT/OT, doctors, social worker
- Make referrals for other evaluations - audiologist, counseling, etc...



Questions to ask during the farm tour - use your assessment tool!!!

- How does your disability effect this or that typical farm task
- Does farmer do his/her own repairs and maintenace
- Does farmer hire out spraying?
- Does farmer burn firewood?
- How do you load/unload livestock
- How do you do tasks at other times of the year? In July you have to ask about snow removal methods.
- How do you remove honey from the extractor?



More Questions

- Suggest specific options and hear if it has been attempted or why it doesn't work
- Is there a relationship with a welding shop?
- What else is taking place on the location (trucking, sandpit, 4-H animals, housing development next door, spouse's enterprise, customers present)





Official RESNA CEU Provider



RESNA

Rehabilitation Engineering and Assistive Technology Society of North America

Questions?

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