

Electronic Appendix

The Patient Categorisation Tool – (PCAT)

Version 2 (February 2012)

1. Summary score sheet
2. More detailed scoring instructions
3. Exemplar complexity profiles

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Patient Categorisation Tool – Summary Score Sheet

Pt Name:	NHS Number	DOB:
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Complex / Profound Disability			
<input type="checkbox"/> Severe/profound physical disability <input type="checkbox"/> Severe cognitive / communicative disability <input type="checkbox"/> Severe psychological / psychiatric problems <input type="checkbox"/> Challenging behaviours <input type="checkbox"/> Challenging social situation – personal/environmental factors			Other: (Describe)
Complex rehab needs requiring co-ordinated interdisciplinary rehab			
	Category A needs (Score 3)	Category B needs (Score 2)	Category C needs (Score 1)
Specialist medical or neuropsychiatric needs (Tick one)	<input type="checkbox"/> One or more apply: o Complex Ix/Rx o Medically Unstable o High risk o Under MHA section	<input type="checkbox"/> One or more apply: o Routine investigation o Requires monitoring o Medium risk	<input type="checkbox"/> Medically stable and low risk
Intensity No. therapy disciplines Total therapy time/wk (Tick one)	<input type="checkbox"/> Requires ≥one of: o ≥5 disciplines o >25 hours /wk o 1:1 supervision o 2 at a time to treat	<input type="checkbox"/> Requires ≥one of: o 4 disciplines o 20-25 hours /wk	<input type="checkbox"/> 1-3 disciplines and <20 hours /wk
Clinical needs (Circle one)	Severe / complex	Moderate / standard	None/ high level
Physical	3	2	1
Tracheostomy/ventilatory	3	2	1
Swallowing / nutrition	3	2	1
Communication	3	2	1
Cognitive	3	2	1
Behavioural	3	2	1
Mood/emotion	3	2	1
Complex disability management	3	2	1
Social / discharge planning	3	2	1
Family support	3	2	1
Emotional load on staff	3	2	1
Specialist Vocational Rehabilitation (VR) (Tick one)	<input type="checkbox"/> Complex assessment /multi-agency VR	<input type="checkbox"/> Standard VR / work liaison / support	<input type="checkbox"/> None required
Medico-legal issues (Tick one)	<input type="checkbox"/> Complex -interaction with legal system	<input type="checkbox"/> Standard	<input type="checkbox"/> None
Specialist facilities / equipment needs (Tick one)	<input type="checkbox"/> Highly specialist / bespoke	<input type="checkbox"/> Moderately specialist equipment / facilities	<input type="checkbox"/> None / off the shelf standard facilities
Total score	(max 48)	(max 32)	(max 16)

	+ 2	+ 1	+ 0
Expected duration of admission (Tick one)	<input type="checkbox"/> Long (5-6 mths)	<input type="checkbox"/> Medium (3-4 mths)	<input type="checkbox"/> Assessment /rapid (2-4 wks) <input type="checkbox"/> Short (6-8 wks)

Total Score **/50**

Service level required (Clinical impression)	<input type="checkbox"/> Level 1 <input type="checkbox"/> Level 2a <input type="checkbox"/> Level 2b <input type="checkbox"/> Level 3 <input type="checkbox"/> Other	Priority <input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	Reasoning /Alternative recommendations:
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Assessor (Print Name)	Signed:	Date:
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Patient Categorisation Tool – More detailed instructions:

Patient ID:.....

	Category A needs (Score 3)	Category B needs (Score 2)	Category C needs (Score 1)
Specialist medical / neuropsychiatric needs			
Medical	<input type="checkbox"/> Complex specialist investigation/ intervention or <input type="checkbox"/> Medically /surgically unstable	<input type="checkbox"/> Routine investigation/ intervention or <input type="checkbox"/> Currently well but potentially unstable	<input type="checkbox"/> No investigation/ intervention and <input type="checkbox"/> Medically stable
Neuropsychiatric	<input type="checkbox"/> Complex/unstable psychiatric needs or <input type="checkbox"/> High Risk management or <input type="checkbox"/> Treatment under section of the MHA	<input type="checkbox"/> Psychiatric condition stable but requires monitoring or <input type="checkbox"/> Medium Risk management	<input type="checkbox"/> No psychiatric condition and <input type="checkbox"/> Low or no risk
Intensity	<input type="checkbox"/> ≥5 therapy disciplines or <input type="checkbox"/> >25 hours total therapy time per week or <input type="checkbox"/> requires 1:1 supervision or <input type="checkbox"/> ≥2 trained therapists to treat at one time	<input type="checkbox"/> 4 therapy disciplines or <input type="checkbox"/> 20-25 hours total therapy time per week	<input type="checkbox"/> 1-3 therapy disciplines and <input type="checkbox"/> <20 hours total therapy time per week
Clinical needs			
Physical	<input type="checkbox"/> Complex postural tone /contracture management <input type="checkbox"/> ≥ 2 to handle	<input type="checkbox"/> Routine physical issues <input type="checkbox"/> 1 to handle	<input type="checkbox"/> Higher function problems only or <input type="checkbox"/> No physical issues
Tracheostomy/ ventilatory	<input type="checkbox"/> Unstable tracheostomy requiring intensive suction or <input type="checkbox"/> O ₂ sats monitoring programme or <input type="checkbox"/> Active weaning programme or <input type="checkbox"/> Assisted ventilation	<input type="checkbox"/> Tracheostomy in situ but stable	<input type="checkbox"/> No tracheostomy
Swallowing / nutrition	<input type="checkbox"/> Complex swallowing evaluation (eg FEES) or <input type="checkbox"/> Complex nutritional requirements requiring intensive dietary support/intervention	<input type="checkbox"/> Enteral feeding programme or <input type="checkbox"/> Moderate monitoring – eg progressive consistency, dietary content or <input type="checkbox"/> Dietary education (eg healthy eating, weight reduction)	<input type="checkbox"/> Normal or stable modified diet and <input type="checkbox"/> Able to eat independently or with supervision from care staff only and <input type="checkbox"/> Standard dietary / Weight monitoring only
Communication	Complex communication needs requiring: <input type="checkbox"/> Specialist evaluation or <input type="checkbox"/> Complex communication aid set/up provision	<input type="checkbox"/> Moderate communication issues with some listener burden, but able to communicate basic needs and ideas	<input type="checkbox"/> Higher function problems only or <input type="checkbox"/> No problems with communication
Cognitive	Severe cognitive problems requiring <input type="checkbox"/> Intensive support for carryover / orientation etc or <input type="checkbox"/> Complex cognitive / neuropsychological assessment	Moderate cognitive problems requiring <input type="checkbox"/> Structured environment, strategies or <input type="checkbox"/> Routine cognitive assessment eg by O/T	<input type="checkbox"/> Higher function problems only <input type="checkbox"/> No cognitive problems
Behavioural	<input type="checkbox"/> Highly challenging behaviours (eg physical/verbal aggression) requiring interactive behavioural management programme	<input type="checkbox"/> Mild/moderate behavioural issues controlled in structured environment	<input type="checkbox"/> No significant behavioural problems
Mood/emotion	Severe anxiety / depression / emotional lability requiring: <input type="checkbox"/> Specialist evaluation or <input type="checkbox"/> Active management and frequent crisis intervention	<input type="checkbox"/> Mood disorder/adjustment issues under active management with planned programme	<input type="checkbox"/> No significant mood / adjustment issues

Complex disability management	Complex disability management eg <input type="checkbox"/> Evaluation of low awareness state <input type="checkbox"/> Neuro-palliative rehabilitation / end of life care	<input type="checkbox"/> Standard disability management eg set-up of care programme, care booklet, carer training etc	<input type="checkbox"/> None required
Social / discharge planning	<input type="checkbox"/> Complex placement / housing /funding issues requiring extensive multi-agency negotiation	<input type="checkbox"/> Active discharge planning requiring liaison with community SW/DN/OT eg to arrange care package	<input type="checkbox"/> No major discharge issues, taken care of by family / allocated social worker
Family support	<input type="checkbox"/> Major family distress issues require frequent support or crisis intervention	<input type="checkbox"/> Routine family support needs (met by planned meetings)	<input type="checkbox"/> No significant family problems
Emotional load on staff	<input type="checkbox"/> Demanding situation requiring highly experienced staff / extra support for staff	<input type="checkbox"/> Somewhat challenging situation but manageable	<input type="checkbox"/> Minimal or no emotional load on staff

Vocational rehabilitation	Specialist vocational rehabilitation needs eg <input type="checkbox"/> Multi-disciplinary vocational assessment <input type="checkbox"/> Multi-agency support for return to work, retraining or work withdrawal <input type="checkbox"/> Complex support in other roles (eg single-parenting)	Moderate vocational support, <input type="checkbox"/> Work visits or employer liaison or <input type="checkbox"/> Support for other roles, eg home-maker / parenting	<input type="checkbox"/> Not of working age or <input type="checkbox"/> No significant needs for vocational support
Medico-legal issues	Complex medico-legal issues eg requiring interaction with legal system: <input type="checkbox"/> Complex Best interests decisions <input type="checkbox"/> Court of protection applications <input type="checkbox"/> DoLs / PoVA applications <input type="checkbox"/> Litigation issues <input type="checkbox"/> Complex mental capacity / consent issues	Standard medico-legal issues eg <input type="checkbox"/> Mental capacity evaluation <input type="checkbox"/> Standard consent / best interests decisions <input type="checkbox"/> LPoA, advance care planning	<input type="checkbox"/> No significant medico-legal issues
Specialist equipment / facilities	Highly specialist equipment /facilities required eg <input type="checkbox"/> Bespoke Assistive technology <input type="checkbox"/> Highly specialist seating/wheelchair needs <input type="checkbox"/> Bespoke orthotics <input type="checkbox"/> Electronic assistive technology <input type="checkbox"/> Assisted ventilation	Moderate specialist equipment needs eg <input type="checkbox"/> Adapted Wheelchair / seating <input type="checkbox"/> Electric standing frame <input type="checkbox"/> Treadmill/harness training <input type="checkbox"/> Assisted cycling (eg motor-med) <input type="checkbox"/> Splinting / casting	<input type="checkbox"/> No equipment needs or <input type="checkbox"/> Basic off the shelf equipment only and <input type="checkbox"/> Standard exercise facilities, eg plinth, bike tilt-table, parallel bars

Expected duration of admission <input type="checkbox"/> Assessment / rapid intervention (eg 2-4 wks) <input type="checkbox"/> Short stay (eg 6-8 wks) <input type="checkbox"/> Medium stay (eg 3-4 mths) <input type="checkbox"/> Long stay (eg 5-6 mths)	Service level required (Clinical impression)	<input type="checkbox"/> Level 1 <input type="checkbox"/> Level 2a <input type="checkbox"/> Level 2b <input type="checkbox"/> Level 3	Priority <input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low	Reasoning / Alternative recommendations:
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Assessor (Print Name)	Signed:	Date:
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<p>Has onward referral been made?</p> <p><input type="checkbox"/> Yes – if so where.....</p> <p><input type="checkbox"/> N</p>

Exemplar PCAT Scores

Item	Patient 1: Physical disability – Category A		Patient 2: Physical disability – Category B		Patient 3: Cognitive/Behavioural – Category A	
	Score	Descriptor	Score	Descriptor	Score	Descriptor
Medical	3	Medically /surgically unstable	2	Routine investigation/ intervention	1	Medically stable
Psychiatric	1	No psychiatric condition	1	Low or no risk	3	Treatment under section of the MHA
Medical Psychiatric higher score	3		2		3	
Intensity	3	≥5 therapy disciplines	1	1-3 therapy disciplines	2	4 therapy disciplines
Physical	3	≥ 2 to handle	2	One person to handle	1	Higher function problems only
Tracheostomy/ventilatory	3	Active weaning programme	1	No tracheostomy	1	No tracheostomy
Swallowing / nutrition	2	Enteral feeding programme	1	Normal diet	2	Dietary education
Communication	3	Specialist evaluation	1	Higher function problems only	2	Moderate communication issues
Cognitive	3	Complex cognitive assessment	2	Routine cognitive assessment	3	Complex cognitive / neuropsychological
Behavioural	1	No significant behavioural problems	1	No significant behavioural problems	3	Highly challenging behaviours
Mood/emotion	1	No significant mood issues	2	Mood disorder/adjustment issues	3	Active management
Complex disability management	2	Standard disability management	1	None required	1	None required
Social / discharge planning	2	Active discharge planning	1	No major discharge issues	3	Complex placement / housing /funding
Family support	3	Major family distress issues	2	Routine family support needs	2	Routine family support needs
Emotional load on staff	2	Somewhat challenging situation	2	Somewhat challenging situation	3	Demanding situation
Vocational rehabilitation	1	No significant needs	3	Multi-agency support for return to work,	1	Not of working age
Medicolegal issues	3	Litigation issues	2	Mental capacity evaluation	3	Complex mental capacity issues
Specialist equipment/ facilities	3	Highly specialist seating needs	2	Splinting / casting	1	No equipment needs
Expected duration	1	Medium stay (3-4 months)	1	Medium stay (3-4 months)	2	Long stay (5-6 months)
Total PCAT score	39		28		36	