

Reference Materials and Online Resources

These references and resources support the Spring 2026 classes. A full list of citations/references will be provided at the last class. If you have any questions, please contact Karin Taifour at karin@agingcareconsult.com.

DMCA BOOKSHELF

Connolly MT (2023). The measure of our age: navigating care, safety, money, and meaning later in life. Public Affairs/Hatchett.

Farmer T (2017). Grandpa on a skateboard: the practicalities of assessing mental capacity and unwise decisions, 3rd ed. Rethink Press.

Mackenzie J, Wilkinson K, eds (2020). Assessing mental capacity: a handbook to guide professionals from basic to advanced practice. Routledge.

Mordue SJ (2025). The Mental Capacity Act in practice: a shorts primer for social workers. Shorts Media.

Moye J, ed (2020). Assessing capacities of older adults: a casebook to guide difficult decisions. American Psychological Association.

Purser K (2017). Capacity assessment and the law: problems and solutions. Springer.

Reimers K (2019). The clinician's guide to geriatric forensic evaluations. Academic Press/Elsevier.

Schaefer LA, Farrer TJ (2022). A casebook of mental capacity in US legislation: assessment and legal commentary. Routledge.

Soniat B, Micklos MM (2010). Empowering social workers for practice with vulnerable older adults. NASW Press.

KEY DMCA REFERENCE RESOURCES

Adult Protective Services Technical Assistance Resource Center (undated). Capacity screening in Adult Protective Services: <https://theacademy.sdsu.edu/wp-content/uploads/2021/10/APSTARC-CapacityScreeningBrief.pdf>.

American Bar Association resources on capacity assessment, including articles and worksheets: https://www.americanbar.org/groups/law_aging/resources/capacity_assessment/ (Note, Rush Univ training on capacity assessment is listed, but that is no longer offered.)

American Bar Association and American Psychological Association (2021). Assessment of older adults with diminished capacities: a handbook for lawyers, 2nd ed. Washington, DC: ABA/APA. Online at <https://www.apa.org/pi/aging/resources/guides/diminished-capacity.pdf>.

American Bar Association and American Psychological Association (2008). Assessment of older adults with diminished capacity: a handbook for psychologists. Washington, DC: ABA/APA. Online at <http://www.apa.org/pi/aging/programs/assessment/capacity-psychologist-handbook.pdf>.

American Bar Association and American Psychological Association (2006). Judicial determination of capacity of older adults: a handbook for judges. Washington, DC: ABA/APA. Online at <https://www.apa.org/pi/aging/resources/guides/judges-diminished.pdf>.

American Psychological Association (2024). APA guidelines for psychological practice with older adults. Online at <https://www.apa.org/practice/guidelines/guidelines-psychological-practice-older-adults.pdf>.

American Psychological Association, APA Task Force for the Evaluation of Dementia and Age-Related Cognitive Change (2021). Guidelines for the evaluation of dementia and age-related cognitive change. Online at <https://www.apa.org/practice/guidelines/guidelines-dementia-age-related-cognitive-change.pdf>.

California Elder Justice Coalition, website with resources on undue influence and other issues: <https://www.elderjusticecal.org/>

Elder Justice Decision Making Capacity Resource Guide:
<https://www.justice.gov/file/1525271/download>.

Elder Justice Decision Making Capacity Symposium Resource Guide:
https://www.justice.gov/d9/fieldable-panel-panes/basic-panes/attachments/2022/04/12/symposium_resource_guide.pdf.

NCEA's Annual Research Compilation – articles relating to elder abuse, neglect, and exploitation that were published between September 2024 and August 2025: <https://elderjustice.usc.edu/wp-content/uploads/2025/09/NCEA-Elder-Abuse-Annual-Research-Compilation.pdf>

Social Care Institute for Excellence (UK) resources on Mental Capacity Act and assessments: <https://www.scie.org.uk/mca/directory/>.

ASSESSMENT RESOURCES

AAFP Toolkit: <https://www.aafp.org/family-physician/patient-care/care-resources/cognitive-care.html>.

Alabama Research Institute on Aging's Measurement Archive: a collection of empirically supported measures intended to facilitate research and clinical work with older adults, with related native literature(s), psychometric properties, and coding. Online at <https://aria.ua.edu/measurement-archive/>

Alzheimer's Association – info and resources for professionals: <https://www.alz.org/professionals>

GERIATRICS RESOURCES

GeroCentral (APA): <https://gerocentral.org/> - and page on evaluating capacities: <https://gerocentral.org/clinical-toolbox/clinical-issues/decision-making-capacity/>

Hartford Institute for Geriatric Nursing / NYU Meyers - best practice information on care of older adults: <https://hign.org/consultgeri-resources/elearning> and their Try This Series: <https://hign.org/consultgeri-resources/try-this-series>

NIA/NIH Alzheimers and Related Dementias Resources for Professionals:
<https://www.nia.nih.gov/health/health-care-professionals-information/alzheimers-and-related-dementias-resources>

Saint Louis School of Medicine's Aging Successfully / Gateway Geriatric Education Center:
<https://www.slu.edu/medicine/internal-medicine/geriatric-medicine/aging-successfully/>

VA Geriatric Research Education and Clinical Center (GRECC):

https://www.va.gov/grecc/pages/GRECC_Educational_Events_and_Products.asp

Washington State Department of Health Guidelines for Mental Status Exam (2018):

<https://www.dshs.wa.gov/sites/default/files/forms/pdf/13-865add.pdf>

GERIATRICS & MENTAL HEALTH – TRAINING/CEU's

Elder Education Institute of Sound Generations: <https://soundgenerations.org/eldereducationinstitute/>

Boston University School of Social Work / Network for Professional Education – 5 courses, 19 CE hours, \$325: <https://thenetwork.bu.edu/offering/behavioral-health-in-aging-certificate/>

Center for Mental Health and Aging – certificate programs in Mental Health and Aging, and Trauma-Informed Care with Older Adults:

<https://courses.mentalhealthandaging.com/courses/category/mentalhealth>

E4 Center / Rush University Foundational Competencies in Older Adult Mental Health Certificate ONLINE Program offers up to 16 hours of CE, CNE, or CME for a fee (\$175 for the full program, \$15 per course):

<https://e4center.org/training-and-technical-assistance/foundational-competencies-in-older-adult-mental-health-certificate-program/>

Northwest Geriatrics Workforce Enhancement Center lecture series on age-related and dementia-related issues: <https://www.nwgwec.org/geri-series/>

University of Washington Division of Gerontology and Geriatric Medicine's Geriatric/Palliative Care Grand Rounds videos: www.youtube.com/@_gerontologygeriatricmed687

RESOURCES ON OTHER TOPICS

Financial Issues:

AARP/University of Minnesota (2022). Thinking Ahead Roadmap: a guide for keeping your money safe as you age. <https://thinkingaheadroadmap.org/>

FINRA Foundation (2022). What You Don't Know Can Hurt You: Misjudging memory skills can adversely impact financial decision making in old age.

https://www.finrafoundation.org/sites/finrafoundation/files/2024-10/Insights-Brief-Memory-Unawareness_1.pdf

Justice in Aging (2025). Mitigating the Harmful Effects of Medicaid Estate Recovery: Strategies for State Advocates – from Justice in Aging: <https://justiceinaging.org/wp-content/uploads/2025/03/Mitigating-the-Harmful-Effects-of-Medicaid-Estate-Recovery.pdf>

New Retirement Foundation (2021). Age-related financial vulnerability.

<https://www.newretirement.com/retirement/age-related-financial-vulnerability-why-making-financial-decisions-might-be-more-difficult-as-you-get-older/>

Supported Decision Making:

Council on Quality and Leadership: <https://www.c-q-l.org/resources/newsletters/supported-decision-making-an-update-on-trends-in-the-united-states/>

National Resource Center for Supported Decision Making: <https://supporteddecisionmaking.org/>

Less Restrictive Alternatives to Guardianship:

From May 15, 2025 webinar: Advancing Guardianship Practice: Introducing the Judicial Guardianship Worksheet & Less Restrictive Alternatives to Guardianship Guide

- Judicial Guardianship Evaluation Worksheet Tool: <https://www.justice.gov/elderjustice/file/1206636/dl?inline>
- Glossary: <https://drive.google.com/file/d/1fce709nSGb7d1ZNxJwLIX9Qf0Q5qdz8r/view>
- Less Restrictive Alternatives - listing of suggestions/examples by type of need/situation: https://drive.google.com/file/d/1O_cpRBI5s6EmhrLbpS4Z1G5WqufLepfV/view
- Give feedback on the above items: Bonnie.Olsen@med.usc.edu; Lori.Mars@med.usc.edu

Multi Disciplinary Teams:

Multidisciplinary Team Technical Assistance Center (MDT TAC): <https://www.justice.gov/elderjustice/mdt>

The Elder Justice Initiative, in collaboration with the Office for Victims of Crime, hosted the 2025 National Virtual Elder Abuse Multidisciplinary Team (MDT) Summit. The goal of the Summit was to advance the elder abuse MDT field beyond systems collaboration toward the adoption of practices that contribute to increasing access to justice for older Americans. Explore MDT Summit Videos at <https://www.justice.gov/elderjustice/national-elder-abuse-multidisciplinary-team-summit#recordings>.

Voting:

ABA – Voting and Cognitive Impairments:

https://www.americanbar.org/groups/law_aging/resources/voting_cognitive_impairments/

End-of-Life:

National Center on Elder Abuse - Adult Protective Services Work with clients at the end of life: challenges and support needs: <https://ncea.usc.edu/wp-content/uploads/2026/04/NCEA-RT-What-Challenges-Do-APS-Professionals-Face-When-Supporting-Older-Adults-at-the-End-of-Life.pdf>