

## **Reference Materials and Online Resources**

*These references and resources support the Fall 2025 (October-November) classes. A full list of citations will be provided at the last class. If you have any questions, please contact Karin Taifour at [karin@agingcareconsult.com](mailto:karin@agingcareconsult.com).*

### **BOOKSHELF: Key readings**

- 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 REFERENCE RESOURCES: items to download**

Adult Protective Services Technical Assistance Resource Center (undated). Capacity screening in Adult Protective Services: guidance and resources. Retrieved from <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/](https://www.americanbar.org/groups/law_aging/resources/capacity_assessment/)

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>.

## **OTHER ONLINE RESOURCES**

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

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

Alabama Research Institute on Aging's Measurement Archive: Archived here is a collection of empirically supported measures intended to facilitate research and clinical work with older adults. In addition to the measure itself, available information about each measure's native literature(s), psychometric properties, and coding is also provided. Online at <https://aria.ua.edu/measurement-archive/>

Alzheimer's Association Clinical Resources - Cognitive Assessment Tools: <https://www.alz.org/professionals/health-systems-medical-professionals/clinical-resources/cognitive-assessment-tools>

Alzheimer's Association Cognitive Assessment Toolkit: <https://www.alz.org/getmedia/9687d51e-641a-43a1-a96b-b29eb00e72bb/cognitive-assessment-toolkit>

Alzheimer's Association – cognitive testing instructional videos: <http://www.alz.org/health-care-professionals/cognitive-tests-patient-assessment.asp>

California Capacity Declaration form: <https://www.courts.ca.gov/documents/gc335.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](https://www.justice.gov/d9/fieldable-panel-panes/basic-panes/attachments/2022/04/12/symposium_resource_guide.pdf)

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/Insights-Brief-Memory-Unawareness.pdf>

GeroCentral - 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 Try This Series: <https://hign.org/consultgeri-resources/try-this-series>

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/>

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/> and their Rapid Geriatric Assessment: <http://aging.slu.edu/uploads/Letter%20Sized%20RGA%20-%20Rev.%2011-11-2015.pdf>

VA Geriatric Scholars Virtual Learning Community – for the VA providers, but most of the content is accessible to anyone (may have to create an account): <https://www.gerischolars.org/>

Washington State Department of Health Guidelines for Mental Status Exam (2018):  
<https://www.dshs.wa.gov/sites/default/files/forms/pdf/13-865add.pdf>

### **Training/CEU around geriatrics and mental health:**

University of Washington Geriatrics videos: \$45 for 15 hours - dementia topics: <https://www.uwcne.org/geriatric-health/geri2019A>, and <https://www.uwcne.org/geriatrichealth/geri2020-adrd>

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/>

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>

### **Resources on Supported Decision Making:**

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

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

Washington: <https://www.washingtonlawhelp.org/resource/supported-decision-making-agreements> and <https://informingfamilies.org/topic/sdm/>

California: <https://www.csueastbay.edu/cdjr/supported-decision-making-introduction-for-professionals.pdf> and <https://www.dds.ca.gov/newsletter/what-is-supported-decision-making/>

Indiana: <https://www.in.gov/idr/sdm/index.html>

Ohio: <https://www.disabilityrightsohio.org/guardianship-what-are-some-alternatives-to-guardianship>

District of Columbia: <https://www.uls-dc.org/sub-programs/decision-making-support-alternatives-to-guardianship>

### **Resources on 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\\_cpRBI5s6EmhrLbpS4Z1G5WqfLepfV/view](https://drive.google.com/file/d/1O_cpRBI5s6EmhrLbpS4Z1G5WqfLepfV/view)
- Give feedback on the above items: [Bonnie.Olsen@med.usc.edu](mailto:Bonnie.Olsen@med.usc.edu); [Lori.Mars@med.usc.edu](mailto:Lori.Mars@med.usc.edu)