

OTIPM: A model for implementing top-down, client-centered, and occupation-based assessment, intervention, and documentation

**BEV: INITIAL OCCUPATIONAL THERAPY EVALUATION
(Revised 17/09-2005)**

- **Background Information and Reason for Referral:** Bev is a 65-year-old female, currently living in an assistive-living complex. Enjoys cooking, social activities, football, games, TV, church, family. Two supportive daughters live nearby. Past medical history significant for pneumonia, congestive heart failure, and fracture to right hip. Referred for evaluation for potential to return to independent living in own apartment.
- **Reported Current Level of Performance:** Bev reports independence and minimal increase in effort with dressing, bathing, toileting, and grooming; she is satisfied with current level. She reports moderate increase in effort with ironing, making bed, preparing simple meals, washing dishes, and other household tasks. She is unable to change sheets on the bed, reporting imminent safety risk and marked effort. Daughter provides community mobility. Home equipped with raised toilet seat, toilet safety frame, handheld shower head, two grab bars in bathtub, and bathtub transfer bench.
- **Bev's Priorities and Current Status:** Bev expressed a priority to perform four daily life tasks; she was observed performing three of those tasks. The following is Bev's current status:
 1. Iron a shirt — minimally unsafe, moderate inefficiency, and moderate increase in effort while standing and supporting self on furniture; shortness of breath at completion of task.
 2. Salami sandwich — moderate increase in effort and inefficiency while standing and using a walker; shortness of breath at completion of task.
 3. Making pot of coffee — minimally inefficient and moderate increase in effort; shortness of breath at completion of task.
 4. Making bed — to be assessed.
- **Actions of Performance of Most Concern:** Bev's ability to iron a shirt when standing is limited by moderate instability when standing and walking, and her need to persistently prop on the ironing board. Her persistent need to prop interferes with her task performance, especially when lifting task objects (e.g., the iron), positioning herself in relation to her workspace, and organizing objects within her workspace. She demonstrates shortness of breath during her task performance and her overall performance is slow. She is markedly deficient in adapting her performance to overcome her problems and her problems persist throughout task performance.

Her performance during simple meal preparation tasks (e.g., making a sandwich, preparing a pot of coffee) is limited by. . . .
- **Interpretation:** Cognition, memory, judgment appear intact. Frailty, low activity tolerance, poor balance, and decreased lower limb strength appeared to impact ADL performance. Crowded/poorly organized workspaces hinder ADL task performance.
- **Goals**
 1. Given set-up of ironing board, Bev will safely and efficiently iron a shirt, with only minimal increase in effort and without evidence of shortness of breath.
 2. Bev will make a simple meal (sandwich, cup of coffee) independently and with minimal increase in effort, without evidence of shortness of breath.
- **Intervention Plan**
 1. Graded restorative occupation to increase activity tolerance.
 2. Collaborative consultation
 3. Education
 4. Adaptive occupation (modify environment, provide adapted equipment, teach compensatory strategies).
- **Potential to Benefit from Intervention:** Good for goals as stated secondary to Bev's high level of motivation, ability to follow directions, and supportive family members.

OTIPM: A model for implementing top-down, client-centered, and occupation-based assessment, intervention, and documentation

**CHRIS: INITIAL NOTE
(Revised 17/09-2005)**

- **Background Information and Reason for Referral:** Chris is a 7 years old. He is the only student with special needs currently integrated into his regular education 1st grade class. He is eager to please and wants to fit in with the other children, but is often separated from the other students. He currently receives assistance from an aide. His parents are strong advocates for Chris. He was referred because of teacher concerns that he does not pay attention when working on math concepts.
- **Reported Current Level of Performance:** Chris' teacher reports that Chris is able to write his name and write numbers 1 to 10. His numbers and letters are irregular in size and shape. He does not stay on task when doing math manipulatives. He cuts and pastes in his journal, colors, and uses a computer, but his abilities were not reported. He has limited social interactions with his peers.
- **Priorities and Current Status:** Based on teacher and parental priorities, Chris was observed performing three schoolwork tasks. The following is Chris' current status:
 1. ***Math manipulative with written answer*** — moderate increase in effort and marked inefficiency; requires frequent physical and verbal assistance to stay on and complete task; his social interactions with his teacher were moderately ineffective
 2. ***Cut straight lines and paste into journal*** — moderate increase in effort and moderate inefficiency; requires occasional verbal cues to complete task
 3. ***Keyboarding simple sentences*** — minimal increase in effort and moderate inefficiency, requires occasional verbal assistance to complete the task
- **Actions of Performance of Most Concern:** When Chris is performing math manipulative schoolwork tasks and interacting with his teacher, he experienced minimal increase in effort performing two-handed task actions, especially those that required manipulation of task objects or when exerting enough force when pulling blocks apart. He demonstrated delays initiating and continuing through to completion individual task actions, and as a result, he needed frequent verbal and physical assistance from his teacher to complete the task. He also experienced unacceptable delays and needed assistance searching for and locating task objects (e.g., pencil). He looked away from his task performances and needed verbal cueing to return to task performance. When Chris was interacting with his teacher, he did not turn toward or look at her, nor did he consistently answer her questions or respond to her cues. When he spoke to her, he used only one or two words. Finally, Chris demonstrated limited ability to modify his actions and correct his problems, even with teacher cueing.

When Chris was cutting, pasting into his journal, and keyboarding, his performance was limited by. . . .
- **Interpretation:** While Chris does experience developmental delays that affect both his academic and schoolwork performance, many of his problems appear to be exacerbated by his environment. As a result, his attention is often focused on them rather than on what he should be doing. While his teacher is supportive and attempts to extend warmth to Chris, she does not always give Chris time to respond (e.g., answer questions, perform requested behavior). She only occasionally gives him encouragement or clarifies for Chris the task expectations. When cueing Chris to keep on task, she often uses phrases that may not have direct meaning for Chris (e.g., "Look. It's almost lunch time. Get me three, fast!") as a cue to hurry and choose the correct number of blocks).
- **Goals:**
 1. Given verbal cueing from his aide, Chris will work on math manipulatives for 5 minutes without looking away from the task, and demonstrate only minimal increase in effort and minimal inefficiency.
 2. Within 1 week, Chris will independently and efficiently gather his pencil and paper to his workspace when instructed by his teacher to get them.
 - 3.

OTIPM: A model for implementing top-down, client-centered, and occupation-based assessment, intervention, and documentation

- **Intervention Plan**
 1. Collaborative consultation and education with teacher.
 2. Adaptation (modify environment, and provide adapted equipment or teach compensatory strategies, as needed).
- **Potential to Benefit from Intervention:** Good for goals as stated secondary to the high level of support from his teacher, aide, and parents.