

OT Evaluation : 05/16/2025 (1286483437)

Lima, Mary (MA200210084304)

Date of Birth: 08/18/1943

✓ Patient identity confirmed

Time In: 13:40

Time Out: 14:15

Visit Date: 05/16/2025

Diagnosis / History**Medical Diagnosis:** Hypertensive heart disease with heart failure**OT Diagnosis:** muscle weakness**Relevant Medical History:**

Patient referred to skilled OT services by PCP for generalized weaknesses and difficulty with ADL and IADL tasks. PMHx of HTN, diabetes, GERD and chronic pain, CHF, HOH, poor vision, anxiety, PVD, CAD, anemia, OA, DM type II, Vit d def, obesity, sciatica, HTN Surgery: Cardiac cath/ valve replace/repair this cert period- (Continued)

Prior Level of Functioning:

Mod I with BADL and light IADL including meal prep. Mod I functional mobility with cane.

Patient's Goals:

Improve strength and endurance

Precautions: Fall risk**Homebound?**☐ No

✓ Yes

For a patient to be eligible to receive covered home health services under both Part A and Part B, the law requires that a physician certify in all cases that the patient is confined to his/her home. For purposes of the statute, an individual shall be considered "confined to the home" (homebound) if the following two criteria are met:

Criteria One:

✓ Patient is confined because of illness, needs the aid of supportive devices such as crutches, canes, wheelchairs, and walkers; the use of special transportation; or the assistance of another person in order to leave their place of residence.

AND/OR☐ Patient has a condition such that leaving his or her home is medically contraindicated.**Specify:**

If the patient meets one of the criterion one conditions, then the patient must ALSO meet two additional requirements defined in criterion two below.

Criteria Two:

✓ Patient has a normal inability to leave home.

AND

✓ Leaving home requires a considerable and taxing effort for the patient.

Specify:**Social Supports / Safety Hazards****Patient Living Situation and Availability of Assistance**

Patient lives: Alone

Assistance is available: Occasional / short-term assistance

Current Types of Assistance Received

PCA 5 days a week (15 hours a week)

Safety / Sanitation Hazards

✓ No hazards identified

☐ Steps / Stairs:☐ Narrow or obstructed walkway☐ Cluttered / soiled living area

Other:

☐ No running water, plumbing☐ Lack of fire safety devices☐ Inadequate lighting, heating and/or cooling☐ Insect / rodent infestation☐ No gas / electric appliance☐ Pets☐ Unsecured floor coverings**Evaluation of Living Situation, Supports, and Hazards**

lives in first floor apartment with no stairs to enter

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Vital Signs

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Clinician: Agency, Clinician

Signature:



Signature:

Date: 7/11/2025

Date: 7/10/2025

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Temperature:

97.8 Taken: Temporal

BP:

Prior 160 / 60
Post /

Position

Sitting

Side

Right

Heart Rate:

Prior 58
Post

Respirations:

Prior 15
Post

O2 Sat:

Prior 98
Post

Room Air / Rate

Room Air

Route

via
via

Comments:

Physical Assessment

Speech:

WNL

Vision:

Impaired

Hearing:

Impaired

B hearing aides

Edema:

Oriented:

✓ Person ✓ Place ✓ Time

Muscle Tone:

Good

Coordination:

Fair

Sensation:

Fair

Endurance:

Fair

Posture:

Fair

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Evaluation of Cognitive and/or Emotional Functioning

A+0 to all concepts

Pain Assessment

✓ No Pain Reported

Location Intensity (0-10) Location Intensity (0-10)
0 None 0 None

Primary Site:
Increased by:

Relieved by:

Interferes with:

ROM / Strength

Part	Action	ROM		Strength		Part	Action	ROM		Strength	
		Right	Left	Right	Left			Right	Left	Right	Left
Shoulder	Flexion			4	2	Forearm	Pronation			4	3+
	Extension			4	2		Supination			4	3+
	Abduction			4	2	Wrist	Flexion			4	3+
	Adduction			4	2		Extension			4	3+
	Int Rot			4	2		Radial Deviation			4	3+
	Ext Rot			4	2		Ulnar Deviation			4	3+
Elbow	Flexion			4	3+	Finger	Grip			4	3+
	Extension			4	3+		Flexion			4	3+
	Supination			4	3+		Extension			4	3+

Comments:

Functional Assessment

Independence Scale Key Dep Max Assist Mod Assist Min Assist CGA SBA Supervision Ind with Equip Indep

Balance

☐ Able to assume / maintain midline orientation

Sitting Static: Good Dynamic: Good

Standing Static: Good Dynamic: Fair

Deficits Due To / Comments:

Self Care Skills

Assist Level Assistive Device

Mod I

Toileting / Hygiene

Mod I

Oral Hygiene

Mod I

Grooming

N/A

Shaving

Min A

Bathing

Dressing:

Mod I

Upper Body

Mod I

Lower Body

Manipulation of Fasteners

Socks & Shoes

Feeding

Swallowing

Deficits Due To / Comments:

Bed Mobility

Assist Level

Rolling

S

☐ L ☐ R

Assistive Device

Supine - Sit

S

Sit - Supine

S

Deficits Due To / Comments:

Transfer

Assist Level

Assistive Device

Sit - Stand

S

Stand - Sit

S

Bed - Chair

S

Chair - Bed

S

Toilet or BSC

S

Shower

Tub

Car / Van

Deficits Due To / Comments:

Instrumental ADLs

Assist Level Assistive Device

Mod A

Light Housekeep

S

Light Meal Prep

Min A

Clothing Care

Indep

Use of Telephone

Indep

Manage Money

Mod A

Manage Medication

Indep

Home Safety Awareness

Deficits Due To / Comments:

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Functional Assessment (Continued)

Independence Scale Key **Dep** **Max Assist** **Mod Assist** **Min Assist** **CGA** **SBA** **Supervision** **Ind with Equip** **Indep**

Motor Coordination

Prior to Injury
Dominance

☒ Right handed ☐ Left handed

Deficits Due To

Fine Motor
Gross Motor

WNL
WNL

Comments:

Cognitive Status / Perception

Memory: Short Term
Memory: Long Term
Safety Awareness
Judgment
Visual Comprehension
Auditory Comprehension
Stereognosis
Spatial Awareness
Ability to Express Needs
Attention Span
Comments:

WNL
WNL
WNL
Impaired
WNL
WNL
WNL
WNL
WNL
WNL

Deficits Due To

Evaluation and Testing Description:
BORG 7/10

DME

Available

☐ Wheelchair ☒ Walker ☐ Hospital Bed ☐ Bedside Commode ☐ Raised Toilet Seat ☐ Tub / Shower Bench
☐ Splints ☒ Cane ☒ Reacher ☐ Sock Donner ☐ Dressing Stick ☒ Shower Chair
☐ Long-Handled Sponge

Other:

Needs

Evaluation Assessment

Evaluation Assessment Summary

Patient referred to skilled OT services by PCP for generalized weaknesses and difficulty with ADL and IADL tasks. PMHx of HTN, diabetes, GERD and chronic pain, CHF, HOH, poor vision, anxiety, PVD, CAD, anemia, OA, DM type II, Vit d def, obesity, sciatica, HTN Surgery: Cardiac cath/ valve replace/repair this cert period- healed w/o complications PLOF: Mod I with BADL and light IADL including meal prep. Mod I functional mobility with cane. During OT evaluation, patient A +O to all (Continued)

Functional Limitations

☒ Decreased ROM / Strength ☒ Impaired Balance / Gait ☐ Increased Pain ☒ Decreased Endurance
☐ Decreased Transfer Ability ☐ Decreased Bed Mobility ☒ Decreased Self-Care ☐ Poor Safety Awareness

Comments:

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Treatment Goals and Plan

Refer to last page for patient goal and intervention documentation.

Comments:

Care Coordination

Conference with:

☐ PT ☐ PTA ☐ OT ☐ COTA ☐ ST ☒ SN ☐ Aide ☐ Supervisor Other:

Name(s):

Regarding:

☒ Physician Notified Re: Plan of Care, Goals, Frequency, Duration and Direction

Other Discipline Recommendations: ☐ PT ☐ ST ☐ MSW ☐ Aide Other:

Reason:

Statement of Rehab Potential

Good

Treatment / Skilled Intervention This Visit

Comprehensive assessment completed

Discharge Plan

☐ To self care when goals met ☒ To self care when max potential achieved ☐ To outpatient therapy with MD approval
☐ Other:

Therapist Signature (FRANCO , ELIZABETH) & Date of Verbal Order for Start of OT Treatment

Digitally Signed by: ELIZABETH FRANCO , OT

Date

05/16/2025

Physician Name

Daniel Martin MD

Physician Phone: (508) 996-3991

Physician FAX: (508) 213-3429

Physician Signature

Date

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Treatment Goals and Plan Audits

Goal Summary

Unmet Goals (3)

(FT) Patient will improve dynamic standing balance to Good to reduce risk of falls by discharge **Goal Term:** long **Target Date:** 06/03/25

(FT) Patient will improve functional activity tolerance as evidenced by BORG <4/10 during ADL/IADL task by discharge **Goal Term:** long **Target Date:** 06/03/25

(FT) Patient will improve gross B UE strength by 1 muscle grade to promote independence with ADL and IADL tasks by discharge **Goal Term:** long **Target Date:** 06/03/25

Goals and Interventions Updated This Visit

Goals Added (3)

(FT) Patient will improve gross B UE strength by 1 muscle grade to promote independence with ADL and IADL tasks by discharge **Target Date:** 06/03/25 **Goal Term:** long

(FT) Patient will improve dynamic standing balance to Good to reduce risk of falls by discharge **Target Date:** 06/03/25 **Goal Term:** long

(FT) Patient will improve functional activity tolerance as evidenced by BORG <4/10 during ADL/IADL task by discharge **Target Date:** 06/03/25 **Goal Term:** long

Interventions Added (3)

(FT) Occupational Therapy to perform therapeutic exercises and develop home exercise program to restore functional strength and range of mobilization of joints.

(FT) Occupational therapy to provide neuro reeducation and balance challenges to improve static and dynamic standing balance to restore independence and reduce risk of falls


(FT) Occupational therapy to provide education on energy conservation techniques to improve functional activity tolerance during functional tasks

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OT Evaluation Addendum Page : 05/16/2025

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Relevant Medical History

healed w/o complications

Evaluation Assessment Summary

concepts, pleasant and cooperative. Vitals WNL with BP slightly elevated. Patient reporting no pain currently but does have chronic back pain, B knee pain and L shoulder pain. Patient does take pain medication daily to manage. Patient demo S with functional mobility and xfers with cane. Patient demo Good static standing balance and Fair dynamic standing balance. Patient is at high risk for falls. Patient demo R UE AROM WFL with gross strength 4/5. Patient with limited L shoulder AROM from previous fx and surgery. L shoulder strength 2/5. L elbow through hand 3+/5. Patient requires Min A with bathing, mod I dressing with increased time needed, Patient reports increased fatigue with dressing. BORG 7/10. Patient S with meal prep again with complaints of fatigue with task. Patient goals to improve strength and functional activity tolerance to improve ease, safety and independence with ADL and IADL tasks. Patient requires skilled OT services 2x a week including selfcare, therex, ther-act, neuro reeducation and pt/cg ed. Patient receptive and agreeable to OT POC.

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