



OT Home Health Evaluation Checklist & Quality Measures

This checklist is not comprehensive and does not replace the clinical judgment of an occupational therapist. The checklist should be used as a reminder of baseline areas that should be addressed during the OT evaluation process. The areas below relate to occupation-based practice and quality performance measures.

Use the checklist below during the evaluation as a reminder of key clinical areas to address. AOTA encourages practitioners to print off the checklist and bring it with you to help guide client evaluations, as well as to educate and train your colleagues regarding the occupational therapy evaluative process. The checklist supports high quality OT evaluations that lead to occupation-based, client-centered interventions.

A comprehensive occupational therapy evaluation is based on a theoretical model and follows the *Occupational Therapy Practice Framework*. A top-down approach identifies occupations that are challenging and important to the client and then assesses related performance skills, client factors, environments and context, and performance patterns.

For more information on the Medicare Patient Driven Groupings Model (PDGM), this checklist, and the important role of occupational therapy click on Home Health at www.aota.org/value.

Occupational Profile:

Download the template at www.aota.org/profile.

- Client's Concerns
- Successful occupations
- Interests & Values
- Occupational History
- Performance Patterns
 - Habits
 - Routines
 - Roles
 - Rituals
- Environment: Supports & Barriers (Physical, Social)
- Context: Supports & Barriers (Cultural, Personal, Temporal, Virtual)
- Client's Priorities and Desired Outcomes

Analysis of Occupational Performance

Click on the Quality Toolkit at www.aota.org/value for links to standardized assessments and screeners used in each of the areas below.

	Addressed	Is this area a Priority		Addressed	Is this area a Priority
Occupations					
ADLs	<input type="checkbox"/>	<input type="checkbox"/>	IADLs	<input type="checkbox"/>	<input type="checkbox"/>
Performance Skills					
Psychosocial/Behavior Skills	<input type="checkbox"/>	<input type="checkbox"/>	Fall Prevention/Fear of Falling	<input type="checkbox"/>	<input type="checkbox"/>
Client Factors—In addition to areas identified while addressing ADLs and IADLs (e.g., motor, sensation, pain)					
Vision	<input type="checkbox"/>	<input type="checkbox"/>	Functional Cognition	<input type="checkbox"/>	<input type="checkbox"/>
Performance Patterns					
Habits, Routines, Roles	<input type="checkbox"/>	<input type="checkbox"/>			
Contexts & Environments					
Include Safety Screen	<input type="checkbox"/>	<input type="checkbox"/>			

Home Health Quality Measures (2020)

Download details and read more about the Value Based Payment and Quality Reporting Programs in HH at www.aota.org/value.

Agencies are scored based on the measures below. Talk to your administration/team to identify your agency's current scores and which measures are priorities for your team. How does your practice contribute to your facility scores on priority measures?

Quality Reporting Program

Measure	Our Score as of _____ (date)	Notes
Percentage of home health quality episodes during which patients improved or stayed the same in ability to groom self .		
Percentage of home health quality episodes during which patients improved in ability to dress upper body .		
Percentage of home health quality episodes during which patients improved in ability to dress lower body .		
Percentage of home health quality episodes during which the <u>patient got better</u> at bathing self .		
Percentage of home health quality episodes during which the <u>patient improved or stayed the same</u> in the ability to bathe .		
Percentage of home health quality episodes during which <u>patients improved</u> in ability to get to and from and on and off the toilet .		
Percentage of home health quality episodes during which <u>patients improved or stayed the same</u> in ability to get to and from and on and off the toilet .		
Percentage of home health quality episodes during which <u>patients improved or stayed the same</u> in ability to manage toileting hygiene .		
Percentage of home health quality episodes during which the <u>patient improved</u> in ability to get in and out of bed .		
Percentage of quality episodes in which the patient has one or more Stage 2-4 pressure ulcers , or an unstageable ulcer/injury, present at discharge that is new or worse since the beginning of the quality episode.		
Percentage of quality episodes in which the patient experiences one or more falls with major injury .		
Percentage of home health stays in which patients were admitted to an acute care hospital during the 60 days following the start of the home health stay.		
Percentage of home health quality episodes in which patients were screened for depression (using a standardized depression screening tool) at start/resumption of care.		
Percentage of home health quality episodes in which patients had a multi-factor fall risk assessment at start/resumption of care.		
Percentage of home health quality episodes in which diabetic foot care and patient/caregiver education were included in the physician ordered plan of care and implemented (at the time of or at any time since the most recent SOC/ROC assessment).		