

# OTIS WeHSA Documentation Checklist

Date of Documentation Review:

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<i>Day</i>			<i>Month</i>			<i>Year</i>			

DateComp

Reviewer:

<input type="text"/>
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NameComp

WeHSA Assessor (OT):

<input type="text"/>
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Assessor

Participant Number:

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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ParticipantID

Geographic Location:

<input type="text"/>
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Location

Environmental Assessment and Modification Documentation Checklist based on best practice and the person / environment / occupation conceptual framework for occupational therapy practice.

The assessment must meet the following criteria to be deemed comprehensive:

1. Comprehensive process of hazard identification and priority setting taken place, taking into account personal risk and environmental audit
2. An assessment tool used, which has been validated for the broad range of potential fall hazards
3. Involve a formal, observational evaluation of functional capacity (e.g. physical capacity, behaviour, functional vision, habits) of the person within the context of their environment
4. Adequate follow-up planned by the health professional and support identified for adaptations and modifications
5. Include active involvement of the older person in the assessment and priority setting

# OTIS Documentation Checklist

KEY: N/A= Not Applicable; 0=Not documented; 1=Documented-some elements included; 2=Documented-most elements included; 3=Documented-all elements included

KEY ELEMENT	RATING	COMMENTS
<b>1. Discussed history and risk of falls with participant, if possible, otherwise with family / carer</b>		
Evidence that history of falls / falls risk were discussed:	<b>N/A 0 1 2 3</b>	
Nature of falls sustained <span style="float: right; border: 1px solid black; padding: 2px;">History</span>	<span style="border: 1px solid black; padding: 2px;">9</span> <span style="border: 1px solid black; padding: 2px;">0</span> <span style="border: 1px solid black; padding: 2px;">1</span> <span style="border: 1px solid black; padding: 2px;">2</span> <span style="border: 1px solid black; padding: 2px;">3</span>	<span style="border: 1px solid black; padding: 2px;">HistoryInfo</span>
Participant's perception of cause		
Fear of falling		
Lifestyle / risk taking behaviour		
Activities participant engages in		
Patterns of usage of the home		
Existing strategies to reduce risk		
Participant's perception of risk		
<b>2. Assessed functional vision</b>		
Functional vision assessment completed	<b>N/A 0 1 2 3</b>	
<span style="float: right; border: 1px solid black; padding: 2px;">Vision</span>	<span style="border: 1px solid black; padding: 2px;">9</span> <span style="border: 1px solid black; padding: 2px;">0</span> <span style="border: 1px solid black; padding: 2px;">1</span> <span style="border: 1px solid black; padding: 2px;">2</span> <span style="border: 1px solid black; padding: 2px;">3</span>	<span style="border: 1px solid black; padding: 2px;">VisionInfo</span>
<b>3. Assessed functional cognition</b>		
Evidence that functional cognition assessed	<b>N/A 0 1 2 3</b>	
<span style="float: right; border: 1px solid black; padding: 2px;">Cognit</span>	<span style="border: 1px solid black; padding: 2px;">9</span> <span style="border: 1px solid black; padding: 2px;">0</span> <span style="border: 1px solid black; padding: 2px;">1</span> <span style="border: 1px solid black; padding: 2px;">2</span> <span style="border: 1px solid black; padding: 2px;">3</span>	<span style="border: 1px solid black; padding: 2px;">CognitInfo</span>
<b>4. Assessed functional balance</b>		
Functional balance assessment completed	<b>N/A 0 1 2 3</b>	
<span style="float: right; border: 1px solid black; padding: 2px;">Balance</span>	<span style="border: 1px solid black; padding: 2px;">9</span> <span style="border: 1px solid black; padding: 2px;">0</span> <span style="border: 1px solid black; padding: 2px;">1</span> <span style="border: 1px solid black; padding: 2px;">2</span> <span style="border: 1px solid black; padding: 2px;">3</span>	<span style="border: 1px solid black; padding: 2px;">BalanceInfo</span>
<b>5. Assessed functional mobility (TUG)</b>		
TUG completed and score recorded	<b>N/A 0 1 2 3</b>	
<span style="float: right; border: 1px solid black; padding: 2px;">TUG</span>	<span style="border: 1px solid black; padding: 2px;">9</span> <span style="border: 1px solid black; padding: 2px;">0</span> <span style="border: 1px solid black; padding: 2px;">1</span> <span style="border: 1px solid black; padding: 2px;">2</span> <span style="border: 1px solid black; padding: 2px;">3</span>	<span style="border: 1px solid black; padding: 2px;">TUGInfo</span>

**6. WeHSA used to assess functional capacity whilst participant doing tasks within the context of their environment**

Evidence that WeHSA assessment included:	N/A	0	1	2	3		
Collaborative problem solving	Capacity	9	0	1	2	3	CapacityInfo
Risk taking and protective behaviours							
Identification of hazards							
Awareness raising / education about hazards (where appropriate)							
Review of activities carried out in the home							
Roles within the home							
Discussion about social support							
Safe mobility strategies							
Discussion about task modification							

**7. All sections and items of WeHSA completed / clinical reasoning explained if unable to complete or item not applicable**

	N/A	0	1	2	3		
a. External trafficways	ClinReas	9	0	1	2	3	Summarise the completion rates for individual items (NOTE: the UoY can summarise completion rates electronically via the scanned assessment forms – reviewer to comment on the clinical reasoning behind N/A items)
b. General indoors							
c. Mobility aid							
d. Pets							
e. Living room							
f. Seating							
g. Medication management							
h. Safety call system							
i. Bedroom							
j. Footwear							
k. Bathroom							
l. Toilet area							
m. Kitchen							
n. Laundry							
						ClinReasInfo	

8. Participant engaged in identifying hazards												
Evidence that the OT engaged the participant in identifying hazards and falls risks	<table border="1"> <tr> <td>N/A</td> <td>0</td> <td>1</td> <td>2</td> <td>3</td> </tr> <tr> <td>9</td> <td>0</td> <td>1</td> <td>2</td> <td>3</td> </tr> </table>	N/A	0	1	2	3	9	0	1	2	3	HazardsInfo
N/A	0	1	2	3								
9	0	1	2	3								
9. Participant engaged in devising possible solutions to minimise identified hazards												
Evidence that the OT engaged the participant in problem solving and deriving solutions	<table border="1"> <tr> <td>N/A</td> <td>0</td> <td>1</td> <td>2</td> <td>3</td> </tr> <tr> <td>9</td> <td>0</td> <td>1</td> <td>2</td> <td>3</td> </tr> </table>	N/A	0	1	2	3	9	0	1	2	3	SolutionsInfo
N/A	0	1	2	3								
9	0	1	2	3								
Evidence that barriers to change were identified and discussed, if relevant												
10. List of mutually agreed recommendations prioritised by participant												
Were the recommendations made based on the information gathered?	<table border="1"> <tr> <td>N/A</td> <td>0</td> <td>1</td> <td>2</td> <td>3</td> </tr> <tr> <td>9</td> <td>0</td> <td>1</td> <td>2</td> <td>3</td> </tr> </table>	N/A	0	1	2	3	9	0	1	2	3	RecommInfo
N/A	0	1	2	3								
9	0	1	2	3								
Is there evidence that the OT engaged the participant in prioritising the recommendations?												
Were the recommendations in line with what would be expected in view of the risks and hazards identified?												
11. Action plan left with participant												
Was an action plan completed?	<table border="1"> <tr> <td>N/A</td> <td>0</td> <td>1</td> <td>2</td> <td>3</td> </tr> <tr> <td>9</td> <td>0</td> <td>1</td> <td>2</td> <td>3</td> </tr> </table>	N/A	0	1	2	3	9	0	1	2	3	ActPlanInfo
N/A	0	1	2	3								
9	0	1	2	3								
Was a copy of the action plan given to participant, or was a plan made to do so?												
12. Adequate follow-up planned and support identified for adaptations and modifications												
Was a follow-up plan made?	<table border="1"> <tr> <td>N/A</td> <td>0</td> <td>1</td> <td>2</td> <td>3</td> </tr> <tr> <td>9</td> <td>0</td> <td>1</td> <td>2</td> <td>3</td> </tr> </table>	N/A	0	1	2	3	9	0	1	2	3	FUpInfo
N/A	0	1	2	3								
9	0	1	2	3								
Was there evidence that support for adaptations and modifications was discussed, if applicable?												

**Overall score** calculate the mean (add the scores together for each completed element - i.e., all for which N/A is not recorded - and divide by number of completed items):

TotalScore	

● Reviewer's comments:

What did the assessor do well?

ObsComments1
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What, if anything, could have been done better?

ObsComments2
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Other comments ...

OthComments
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