Occupational Therapy Instrumental Activities of Daily Living (IADLs) Evaluation

Evaluation Information
Date of evaluation: October 5, 2024
Client name: Jordan Smith
Client age: 78
Client History
Background:
Jordan is a retired school teacher, living alone in a two-story house. Enjoys gardening and woodworking.
Is the client currently receiving therapy services or has the client received therapy services in the past?
☑ Yes ☐ No
If yes, please explain therapy history, type, and goals addressed:
Jordan received physical therapy in 2022 for post-knee replacement surgery. Goals addressed included improving knee strength and mobility.
Medical history:
Hypertension, knee replacement surgery in 2022.
Does the client have a diagnosis?
☑ Yes ☐ No ☐ Unsure
If yes or unsure, please provide more details:
Chronic lower back pain.

Current concerns:

Difficulty with stairs, managing household chores, and participating in previously enjoyed hobbies due to back pain.

Behavior and engagement during occupational therapy evaluation:

Jordan is highly motivated and actively participated in the evaluation process.

Instrumental Activities of Daily Living (IADLs)

☐ Care of others (including selection and supervision of caregivers)

☑ Care of pets and animals

Has difficulty bending to feed the cat.

☑ Communication management

Uses phone and computer without issues.

☑ Driving and community mobility

Drives short distances, but avoids night driving and long trips due to discomfort.

☑ Financial management

Manages finances independently but reports difficulty sitting for prolonged periods to pay bills online.

☑ Home establishment and management

Struggles with maintaining the home, especially vacuuming and changing bed linens.

☑ Meal preparation and cleanup

Can prepare simple meals but finds standing for long periods challenging.

☐ Religious and spiritual expression

☑ Safety and emergency maintenance

Concerned about managing in an emergency due to mobility issues.

☑ Shopping

Able to shop but limits to shorter outings because of back pain.

Assessment Summary

Observations and impressions:

Jordan shows a strong desire to maintain independence but is hindered by physical limitations and pain.

Justification for treatment:

To improve Jordan's ability to perform IADLs safely and efficiently, enhancing quality of life and independence.

Interpretation of results:
Limitations in physical mobility and endurance impact Jordan ’ s ability to fully engage in IADLs.
Goals
Goal #1
Goal:
Increase ability to care for pets independently within 6 weeks.
Baseline:
Currently needs assistance to feed and care for the pet.
Goal #2
Goal:
Improve comfort and safety in home management tasks within 8 weeks.
Baseline:
Struggles with tasks requiring bending, lifting, or prolonged standing.
Goal #3
Goal:
Enhance ability to perform meal preparation and cleanup with minimal discomfort within 10 weeks.
Baseline:
Can only stand for up to 10 minutes before needing to rest.
Goal #4
Goal:
Increase safety and mobility in the community, focusing on driving and shopping within 12 weeks.

Baseline:

Avoids long trips and struggles with carrying shopping items.

Goal #5

Goal:

Develop strategies for emergency management and safety within the home within 14 weeks.

Baseline:

Expresses concern about handling emergencies due to current mobility limitations.

Recommendations

Frequency of therapy:

2 times per week for 12 weeks.

Home program:

Tailored exercises to improve strength and flexibility, ergonomic adjustments to the home, and adaptive tools for easier pet care and meal preparation.

Other information:

Consideration for a home safety evaluation to identify and mitigate potential fall hazards.