

PEDIATRIC OCCUPATIONAL THERAPY EVALUATION

Evolving Therapy & Wellness

PART I: BACKGROUND INFORMATION & STRUCTURAL FRAMEWORK

1. Patient Identification

Field	Information
Patient Name	
Date of Birth / Age	
Medicaid ID #	
Address	
Primary Caregiver <i>(name, relationship, contact)</i>	
Caregiver(s) Present at Evaluation	

2. Reason for Referral

Area	Information
Referring Provider / Source	
Primary Reason for Referral	
Caregiver Chief Concern	

3. Birth History

Area	Information / Notes
Prenatal History <i>(complications, medications, exposures)</i>	
Delivery <i>(type: vaginal / C-section; gestational age; complications)</i>	
NICU <i>(Y/N; duration; reason)</i>	
Birth Weight / Apgar Scores	
Other Birth Notes	

4. Medical History

Area	Information / Notes
Diagnoses	
Medications <i>(name, dose, purpose)</i>	
Precautions / Contraindications <i>(weight-bearing, seizure, behavioral, medical)</i>	

Surgeries + Hospitalizations

Event	Date / Details / Outcome
Surgeries	
Hospitalizations	
Notes	

Medical Screenings + Recent Evaluations

Screening / Visit	Date / Provider / Findings / Concerns
Recent Physician / Pediatrician Visit	
Eye Exam / Vision Screening	
Hearing Screening	
Nutritional / Feeding Evaluation	
Developmental Pediatrician	
Neurological Evaluation	
Psychological / Behavioral Evaluation	
Other Screenings	

5. Occupational Profile

Area	Information / Notes
Social History <i>(what matters most to the family; stated therapy goals; caregiver burden; support system; daily routines)</i>	
Prior Level of Function <i>(baseline before current concerns emerged)</i>	
Current Level of Function <i>(present functional status across daily tasks)</i>	
Treatment History <i>(prior OT, PT, ST, ABA, other; frequency; duration; progress)</i>	
Assistive / Adaptive Devices Currently Used <i>(orthotics, AAC, mobility aids, adaptive equipment, sensory tools, etc.)</i>	
Sleep Habits & Positioning Concerns <i>(routine, duration, sensory factors, sleep positioning)</i>	

6. Home, School & Cultural Context

Area	Information / Notes
Primary Language(s) Spoken at Home	
Language(s) Used at School / Therapy	