

2025 UK Parkinson's Audit: Occupational therapy – patient audit case sheet

Use this to record your patient cases before entering the data on the online tool

1. Demographics		
1.1	Patient identifier	
1.2	Gender	<ul style="list-style-type: none"> • Male • Female • Other/patient prefers not to say
1.3	Ethnicity	<ul style="list-style-type: none"> • White <ul style="list-style-type: none"> ◦ British ◦ Irish ◦ Gypsy or Irish Traveller ◦ Roma ◦ Any other White background • Asian/Asian British <ul style="list-style-type: none"> ◦ Bangladeshi ◦ Chinese ◦ Indian ◦ Pakistani ◦ Any other Asian background • Black/Black British/Caribbean/African <ul style="list-style-type: none"> ◦ African ◦ Caribbean ◦ any other Black background • Mixed/Multiple ethnic groups <ul style="list-style-type: none"> ◦ Asian and White ◦ Black African and White ◦ Black Caribbean and White ◦ Any other Mixed/Multiple background • Other ethnic group <ul style="list-style-type: none"> ◦ Arab ◦ Any other ethnic group • prefer not to say
1.4	Year of birth	
1.5	What setting does this patient live in?	<ul style="list-style-type: none"> • Own home • Residential care home • Nursing home • Other (please specify)

1.6	In what setting was the individual seen?	<ul style="list-style-type: none"> • NHS – outpatient • NHS – community • Private clinic • At home • Other (please specify)
1.7	How was this person assessed? Tick all that apply	<ul style="list-style-type: none"> • In person • Virtually – by video • Virtually – by telephone
1.8	Parkinson's phase	<ul style="list-style-type: none"> • Diagnosis • Maintenance • Complex • Palliative

2. Referral

2.1	Year of Parkinson's diagnosis	
2.2	Has the person received previous occupational therapy specifically for Parkinson's?	<ul style="list-style-type: none"> • Yes • No (skip to Q2.4) • Offered but declined (skip to Q2.4) • Unknown (skip to Q2.4)
2.2a	If yes, what was the year of first referral? (Year or unknown)	
2.3	When the person was first referred to any OT service, at what stage of their Parkinson's were they?	<ul style="list-style-type: none"> • Diagnosis • Maintenance • Complex • Palliative • Unknown

Current episode of care

2.4	Who made the referral to OT?	<ul style="list-style-type: none"> • Elderly care consultant • Neurologist • Parkinson's nurse specialist • General/non-PDNS nurse • GP • Allied health professional colleague (physio/SLT) • Dietician • Social care worker • Self-referral/relative • Other (please specify) • Unknown
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2.5	What was the time between the date of the referral and the date of the initial appointment for this episode of care?	<ul style="list-style-type: none"> • 1 to 4 weeks • 5 to 8 weeks • 9 to 12 weeks • 13 to 18 weeks • More than 18 weeks
2.6	<p>What was the reason for referral to OT?</p> <p>Tick all that apply</p>	<ul style="list-style-type: none"> • Staying well: <ul style="list-style-type: none"> ○ Health and well-being promotion ○ Education ○ Self-management ○ Family roles and relationships ○ Sexual intimacy ○ Work ○ Leisure activities ○ Community skills ○ Driving • Optimising function: <ul style="list-style-type: none"> ○ Mobility ○ Falls prevention ○ Transfers ○ Bed mobility ○ Posture and seating ○ Eating and drinking ○ Personal care ○ Domestic skills ○ Fatigue management ○ Handwriting and communication • Cognitive and emotional well-being • Engagement / motivation • Equipment provision/ environmental adaptations • Carer support • Moving and handling guidance • Pressure care management
2.7	Was a letter sent to the referrer?	<ul style="list-style-type: none"> • Yes • No
2.7a	If no:	<ul style="list-style-type: none"> • Not current practice • Therapy ongoing but letter to be sent on completion • No requirement as discussed directly with referrer at MDT review

	If yes:	
2.7b	Did the letter include details of the therapy assessment?	<ul style="list-style-type: none"> • Yes • No
2.7c	Did the letter include therapy outcome scores?	<ul style="list-style-type: none"> • Yes • No
2.7d	Did the letter include an intervention plan?	<ul style="list-style-type: none"> • Yes • No
2.8	Was the reason for referral reflective of patient need?	<ul style="list-style-type: none"> • Yes - OT intervention for referral reason only • Yes - but additional OT needs identified • No - referral to OT was not appropriate
3. Goals identified		
3.1	Were therapy goals set in collaboration with the patient and/or carer?	<ul style="list-style-type: none"> • Yes • No
3.2	Were standardised assessments used with this patient?	<ul style="list-style-type: none"> • Yes • No
3.2a	If yes, what areas were you assessing for? Tick all that apply	<ul style="list-style-type: none"> • Activity, function, participation • Cognition • Mood • Fatigue • Goal setting • Health and wellbeing
4. Intervention strategies used		
4.1	What was the main approach of your therapeutic interventions? Choose one.	<ul style="list-style-type: none"> • Educational • Restorative • Compensatory
4.2	Which areas of intervention were addressed? Tick all that apply (continues overleaf)	<ul style="list-style-type: none"> • Staying well: <ul style="list-style-type: none"> o Health and well-being promotion o Education o Self-management o Family roles and relationships o Sexual intimacy o Work o Leisure activities o Community skills

		<ul style="list-style-type: none"> o Driving • Optimising function: <ul style="list-style-type: none"> o Mobility o Falls prevention o Transfers o Bed mobility o Posture and seating o Eating and drinking o Personal care o Domestic skills o Fatigue management o Handwriting and communication • Cognitive and emotional well-being • Engagement / motivation • Equipment provision/ environmental adaptations • Carer support • Moving and handling guidance • Pressure care management
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5. About the Occupational Therapist

5.1	What band (grade) is the occupational therapist who carried out the initial assessment of this person?	<ul style="list-style-type: none"> • 4 • 5 • 6 • 7 • 8a • 8b • 8c • Social service grade – junior occupational therapist • Social service grade – senior occupational therapist • Other
5.2	Approximately what percentage of people seen by the audited therapist in a year have Parkinson's?	<ul style="list-style-type: none"> • 0-19% • 20-39% • 40-59% • 60-79% • 80-99% • 100% • Unknown

6. Evidence base

6.1	<p>Which of the following did the audited therapist use to inform clinical practice or guide intervention?</p> <p>Tick all that apply</p>	<ul style="list-style-type: none">• Own Clinical experience• Advice from colleague or supervisor• Occupational therapy for people with Parkinson's - best practice guide 2nd edition (2018)• National Service Framework for Long term Conditions (2005)• NICE - Parkinson's disease: diagnosis and management in primary and secondary care (2017)• Progressive Neurological Conditions toolkit 2019• Allied Health Professionals' competency framework for progressive neurological conditions• Published evidence in a peer reviewed journal (read within last 12 months)• Information from Parkinson's UK website'• Postgraduate training (eg attending course/lectures specific to Parkinson's) within last 24 months• Other (please specify)• None
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