

# Major Home Modifications Documentation: Minimum requirements for Occupational Therapy referrals to HMMS

The NSW Home Modifications and Maintenance Services State Council

## HMMS Referral Form

Complete Home Modification referral form, containing all required information and attach with application form available from local HMMS.

## Consult with HMMS Builder

Consult with HMMS Services for all major modifications as some services sub-contract major modifications. Always check with your home modification service and if they have a builder consult for all major modifications. A joint site visit with the Level 1 HMMS Builder is required for all Level 2 and Level 3 work prior to the final application being submitted by the Level 1 HMMS Service to the Level 2 HMMS Service (Check with your local service prior to submitting reports).

## Occupational Therapy Report

The must Occupational Therapy report must contain the following;

1. Complete for all Level 2 and Level 3 HMMS applications (Occupational Therapy major modification form and minimum requirements available from Level 2 HMMS and State Council website).
2. State Client's eligibility for the funding program.
3. Provide justification as to why the home modification is required, including consideration of carer / other users. Include details of other alternatives considered and/or trialled and why these are not appropriate.
4. Include clinical reasoning if the home modification recommended deviates significantly from AS1428 Part 1-2009 (Incorporating Amendment No. 1), as appropriate.
5. Ensure access to the home has been addressed i.e. continuous accessible path of travel to/from the house and within such as doorways, hallways and circulation spaces.
6. All decisions/recommendations are documented. The OT Report must also be updated to reflect amendments to the diagrammatical and written specifications, including clinical reasoning, as appropriate.
7. Ensure future needs of the client and carer/s have been considered and addressed e.g. degenerative conditions, child's growth, future equipment needs etc. and needs of any others living in the home if applicable.
8. Must include details of joint site visit/s undertaken i.e. date, name of HMMS and/or relevant others present.
9. All modifications must be consistent with identified good practice and where possible

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evidence based practice. (Examples of these are freely available at [Home Modification Clearing House UNSW](#)).

10. The report and recommendations must be peer review by appropriately experienced occupational therapist.

## Information / Title Box (Content)

The following information must be included in information / title box;

1. Client details i.e. name, address, phone number, date of birth and/or contact person.
2. Full contact details of referring OT i.e. name, organisation, phone number/email plus days available.
3. Date must be clearly marked on all plans including all amended plans.
4. Refer to page number in relation to total number of pages sent e.g. 1 of 3 or 2 of 3.
5. Scale must be clearly stated.
6. All measurements in millimetres (mm).

## Diagrammatical Specifications

The following information must be included on diagrammatical specifications;

1. Must be provided for all major modifications.
2. Diagrams must be drawn to scale. Proportional drawings are not acceptable for major modifications.
3. Must include both existing and proposed floor plans and a complete house plan e.g. ramp. Also include existing and proposed elevations if applicable.
4. Diagrams must be clear and labelled correctly. Provide context and location of the modification such as ramp e.g. entrance to house, main bathroom. Label doors, windows, adjacent rooms, hallways or external wall etc. as appropriate.
5. All relevant measurements must be included and legible – a minimum of 2 measurements are required, i.e. vertical e.g. height above floor surface, and horizontal e.g. distance from corner of wall.
6. All measurements must be recorded on diagram in mm.

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- Any amended diagrams must be drawn to scale, dated and signed by the OT to approve changes made.

## Written specifications

All written specification must;

- Be accompanied by diagrammatical specifications.
- Outline a full description of the work required to clearly reflect the diagrammatical specifications.
- Make reference to AS1428 Part 1-2009 (Incorporating Amendment No. 1) as appropriate.
- In point form and legible – typed.
- The location or style of existing fixtures e.g. electrical points, light switches or doorway openings, to ensure these items are listed and comments made that no change is required, even where there are no functional requirements to make such alterations.
- All measurements must be recorded in millimetres (mm) and clearly visible.
- Dimensions of the total area being modified and of main fixtures and adjacent areas e.g. hallways.
- A signed statement by the owner and client (or their legal representative) on all diagrams, with the following statement: “The above plans have been explained to me and I agree to the proposed modifications”.
- Any amendments must also be updated on the written specifications and dated and signed by the OT to approve changes made.
- A disclaimer is compulsory. (Contact your professional body for correct wording).

## Photographs

- Photographs must be included in report.
- Can be used to supplement the diagrammatical and written specifications but not as a replacement.
- Must be clear and labelled correctly i.e. provide context and relation to diagrammatical specifications.

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4. All measurements recorded on photograph must be in mm.
5. Ensure client confidentiality. Client/carer cannot be in photograph or any identifying information. If you email the image, ensure location data is removed. (Note; most pictures taken by smart phones automatically apply this data).
6. Confirm with your organisation their policy in regards to photographs.
7. Email or post only, do not fax photographs.

## Consultation

When working with client and carer the Occupational Therapist must;

1. Provide information to the client/carer in such a way that enables them to make informed choices. This includes both written and verbal information.
2. Discuss with client and/or carer regarding bathroom/access arrangements during modification process.
3. Provide a copy of diagrammatical and written specifications of the proposed modification to the client and/or carer.
4. Inform the client /carer that a financial assessment will be completed by Level 1 HMMS and a client contribution will be discussed then.
5. Inform client /carer of complaints and appeals processes available to them.

The signature of the referring OT may be required on each page of the diagrammatical and written specifications. Always check with your organisation and your local home modification service in regards to emailing diagrams of home modifications and security of email as you are transferring personal health information.

Forward completed OT report to your Level 1 HMMS with the diagrammatical and written specifications. The Level 1 HMMS will forward all documentation to the Level 2 HMM.

**Important Note:** the HMMS builder or supervised contracted builder will generate the Scope of Works.