



Date of Referral: _____
DD/MM/YYYY

CLIENT INFORMATION	
Name:	Date of Birth:
Age:	Gender:
Address:	
Home Phone #:	Cell Phone #:
Email:	
Medicare #:	Expiry Date:
NB Social Development #:	Expiry Date:
Referred By: <i>(Please indicate the relationship to the client)</i>	
Reason for Referral:	
Type of Service/ Assessment Required (select all that apply):	
☐ Mobility Assessment (<i>Wheelchair/ mobility aids</i>)	☐ Home Safety
☐ Wellness (<i>mental health, cognitive and TPI</i>)	☐ Home Accessibility
☐ Longterm Care (<i>care planning and dementia care</i>)	☐ Medical Legal
☐ Pediatric Occupational Therapy	
Do you have a preferred Medical Supplier for equipment? ☐ Yes ☐ No	
If Yes, please indicate which supplier:	
Person to contact for scheduling <u>all</u> appointments: <i>(Please indicate the relationship to the client)</i>	
Name:	Phone #:
	Cell:

Email Address:	
Relationship to Client/Role:	
Person(s) who must attend and/ be informed of appointments and/ or intervention:	
Name:	Phone #:
Email Address:	
Relationship to Client/Role:	
Other contacts: (Caregiver, School staff, Power of Attorney)	
Phone #:	
MEDICAL REFERRAL INFORMATION:	
Family Physician:	
Phone #:	Fax #:
Other Specialists:	
Diagnosis and Medical Information:	
FUNDING INFORMATION:	
Funding for Equipment: ☐ Insurance ☐ Private pay ☐ WorkSafe	
☐ NB Social Development (Incl. Co-pay)	
Name on Insurance policy:	
☐ ID/ ☐ Policy/ ☐ Claim #:	Expiry Date:
BILLING INFORMATION FOR OCCUPATIONAL THERAPY SERVICES:	
Contact Name:	
Address:	
Phone #:	Email: