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## SARAH MALLOY, MS, OTR, CCM, CLCP

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### Profile

Ms. Malloy has over 25 years of experience as an occupational therapist in the rehabilitation field working with the adult and geriatric populations. She has knowledge of a variety of medical conditions and the impact of those conditions on the functional aspects of daily life. These medical conditions include but are not limited to neurological, cardiac, pulmonary, oncology, and medically complex diagnoses. She graduated with Highest Honors (Summa Cum Laude) from Capital University's Law School Life Care Planner professional certificate program.

### Employment

Malloy Life Care Planning  
2019 – present

Certified Life Care Planner

- Life care planning/medical cost projection services

Norwell Visiting Nurses Association and Hospice  
2011 - present

Occupational Therapist

- Performed comprehensive home evaluations of adult and older adults with oncology, complex medical, pulmonology, cardiac, orthopedic and neurological diagnoses
- Projected patient's needs within appropriate scope of practice
- Exposure to CMS rules, regulations and required documentation related to therapy and home-based services case management services completed as necessary in the home care setting
- Provided home health aide supervision and care plan creation on an ongoing basis
- Provided case management services based upon needs assessments and facilitated appropriate referrals as required
- Worked effectively within a multidisciplinary team

Spaulding Hospital Cambridge  
2004 - 2013

Occupational Therapist

- Evaluated complex medical patients with a variety of medical diagnoses including cerebral vascular accidents, spinal cord injuries, amputations and acquired brain injuries
  - Determined current level of functioning using direct observations and physical assessment
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- Accurately completed daily documentation with Meditech computer documentation system
  - Effectively worked within a multidisciplinary team

Cross Country Travcorps  
2005 - 2007

Occupational Therapist

- Worked with adults and older adults with a variety of diagnoses including neurological, cardiovascular and orthopedic
- Effectively provided direct care and case management services
- Maintained computer based daily/weekly records

Health Pro Management Services  
2003 - 2005

Rehabilitation Manager

- Developed and implemented quality assurance projects on a quarterly basis
- Provided direct clinical supervision and mentoring to 15 full time/part time therapists
- Functioned as OT representative within a multidisciplinary team
- Organized and carried out monthly rehabilitation rounds with local physiatrist

Lawrence General Hospital  
2000 - 2003

Senior Occupational Therapist

- Created and organized departmental policy and procedure manual
- Provided monthly data reports to track caseload
- Effectively evaluated and treated a full case load of patients
- Participated in multidisciplinary rounds on a weekly basis

Harvard University, Harvard Medical School  
2000

Contract Occupational Therapist

- Represented OT as a member of the Gold Standard Team collecting data using MDS-PAC at various inpatient acute rehabilitation facilities across the US including Florida, California, Michigan, Connecticut and Idaho
  - Became MDS-PAC and FIM certified
  - Compiled data and research via chart review and patient interviews
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New England Medical Center  
1997 – 2000

Rotating Staff Occupational Therapist

- Provided OT services to both adults and geriatric populations on the inpatient cardiac and orthopedic floors
- Provided OT services to both adults and geriatric populations on the inpatient medical, surgical and cardiac intensive care units
- Completed an OT pediatrics rotation on the pediatric medical floor
- Participated in custom wheelchair clinic and provided written letters of medical necessity
- Developed role for OT in weekly Rheumatology Clinic
- Represented OT on the stroke team with multidisciplinary other members

St. Thomas Psychiatric Hospital  
1996-1997

Staff Occupational Therapist

- Provided mental health OT services to a forensic population on a medium secure psychiatric floor
- Performed comprehensive OT evaluations and treatments to a long-term mental health population
- Organized and led weekly groups including cooking and life skills
- Engaged in regular multidisciplinary team meetings to discuss client's status
- Assisted clients in community re-integration through visits to local establishments

**Education**

Mount Mary University, Milwaukee, Wisconsin 2020- 2021  
Master of Science in Occupational Therapy  
Milwaukee, Wisconsin

Capital University, Columbus, Ohio 2018 – 2019  
Law School  
Post Professional Certificate in Life Care Planning  
Highest Honors

University of Southern California 2001  
Ethel Percy Andrus Gerontology Center, Online Course  
Executive Certificate Program In-Home Modification

University of Western Ontario, London, Ontario 1992 - 1996  
Bachelor of Science in Occupational Therapy  
Dean's Honor List 1993 and 1995

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## Licensure

Occupational Therapy- Massachusetts  
license number 5996 1997

## Board Certifications

The Commission for Case Manager Certification  
certificate number 4240482 2018

National Board for Certification in Occupational Therapy  
certificate number 1012671 1997

## Certifications

International Commission on Health Care Certification  
certificate number 1475 2019

UDSMR Functional Independence Measure (FIM) 2000

Minimum Data Set For Post Acute Care (MDS-PAC) 2000

MoCA (Montreal Cognitive Assessment) 2020

## Professional Memberships, Board Positions, and Volunteer Activities

International Association of Rehabilitation Professionals- New England  
Chapter- Member at Large June 2023  
Present

International Academy of Life Care Planning- Sub-Committee Chair for  
Summit Notes Review & Summit Recording 2023-  
Present

International Academy of Life Care Planning- Committee for Development  
of a Costing Framework 2022-  
Present

American Occupational Therapy Association- AOTA INSPIRE 2023  
Fall Call for Papers Abstract Reviewer 2022

American Occupational Therapy Association and The Center for  
Medicare and Medicaid Innovation- Subject Matter Expert on 2022

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## Occupational Therapy and Case Management

International Academy of Life Care Planning Symposium – Planning Committee 2022

International Association of Rehabilitation Professionals- International Academy of Life Care Planners Section Board- Member at Large June 2021- May 2023

International Association of Rehabilitation Professionals- International Academy of Life Care Planners - current member

International Association of Rehabilitation Professionals, New England Chapter - current member

American Occupational Therapy Association- current member

Canadian Occupational Therapy Association- prior member

Massachusetts Association of Occupational Therapy- prior member

## Publications

Brown, S., Thompson, A. & Malloy, S. (2023). The role of the occupational therapist in life care planning. In Owen, T., Barros-Bailey, M., & Weed, R. O. (Eds.), Life care planning and case management across the lifespan (5th ed.). Routledge. Manuscript in preparation.

Barros-Bailey, M., Brown, S., Maxwell, A., Malloy, S., Latham, S., Thompson, A., & Donohoe, E. (2022). Attendant Care Survey Methodology (ACSM): Introducing a costing model. *Journal of Life Care Planning*, 20(1), 5-26.

Malloy, Sarah. **What is a Certified Life Care Planner? Do I need one for my case?** Massachusetts Bar Association Section Review. 2020; January/February: pg. 2

## Teaching Experience

International Academy of Life Care Planners Symposium, October 2022. Assistive Devices: Low Tech to High Tech

Baker College Center for Graduate Studies, March 2022. Guest Lecturer. Occupational Therapy and Case Management

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The University of Tennessee- Chattanooga, College of Health, Education and Professional Studies, April 2021. Guest Lecturer- Community Based OT, Models of Practice XI: Community

Capital University Law School, Life Care Planner Program, 2020. Productive Aging: The Role of Occupational Therapy

### **Continuing Education**

2/26/2007- Low Vision in Older Adults: Foundations in Rehabilitation- AOTA

7/31/2011 - The Role of the Occupational Therapy Practice Framework in Home Health Care - AOTA Continuing Education

8/17/2011 - Seating and Positioning for Productive Aging: An Occupation-Based Approach - AOTA Continuing Education

9/23/2011 - The Ultimate One-Day Diabetes Course - PESI Healthcare

1/23/2012 - Accepting the Challenge: Providing the Best Care for People with Dementia - North Carolina Division of Health Service Regulation

3/8/2013 - Medication Safety - Homecare Institute

5/10/2013 - Wounds: An Integrated Chronic Care Management Approach

12/16/2015 - Alzheimer's Disease and Related Disorders: Handle with Care- Intensive Training, Relias Learning

2/2016 - Impaired Practice Recognition and Treatment of Colleagues in Crisis- The Human Perspective and Professional Response, NVNA

4/28/16 - Optimizing Function through Rehabilitation for People with Parkinson Disease - Home Health Rehab Managers

1/24/2017 - Rethinking Safety for Older Adults- AOTA Continuing Education

4/14/2017- Mental Health First Aid USA - National Council for Behavioral Health

7/26/2017 - CE Article: A Biopsychosocial Approach for Addressing Chronic Pain in Everyday Occupational Therapy Practice - AOTA Continuing Education

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10/2/2018- Forward Focus: Advocacy, Opportunities and Responsibility - AOTA Continuing Education

12/5/2018 - I Want My Patient to Stand: Evaluation Model and Funding for Standing Power – Permobil

5/23/19 - Chronic Thromboembolic Pulmonary Hypertension (CTEPH): A Review – Academy of Certified Case Managers

5/23/19 - Automating Fall Detection to Prevent Morbidity and Mortality: A Personal Emergency Response System with Optimized Automatic Fall Detection – Academy of Certified Case Managers

10/30/19 -11/1/19 -International Association of Rehabilitation Professionals, National Conference, International Academy of Life Care Planning Symposium

11/15/19- International Association of Rehabilitation Professionals, New England Chapter Conference

4/10/20- An Introduction to the Legal System and the Occupational Therapist as an Expert Witness: One Therapists' Perspective, AOTA CE article

09/12/20-09/13/20, 09/21/20-09/22/20- Academy of Spinal Cord Injury Professionals Annual Virtual Conference

10/07/20-10/10/20 -International Association of Rehabilitation Professionals, Virtual National Conference, International Academy of Life Care Planning Symposium

11/10/21–11/13/21-International Association of Rehabilitation Professionals, Virtual National Conference, International Academy of Life Care Planning Symposium

03/03/22-Pennsylvania Assistive Technology Foundation, Smart Homes Made Simple- Real - Life Stories: Using Smart Home Technology for Independence

05/13/22 – 05/14/22- International Academy of Life Care Planning Summit: Costing Techniques, Survey Results and Development of a Framework in support of Life Care Planning Specialty

07/2022- PESI- Fall Prevention Specialist Certification Course

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10/19/22-10/20/22 -International Association of Rehabilitation Professionals, National Conference, International Academy of Life Care Planning Symposium

02/14/23- International Association of Rehabilitation Professionals Unique, Considerations in Pediatric Life Care Planning

05/04/23 – 05/05/23- International Association of Rehabilitation Professionals, New England Chapter, Spring Conference

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