

**REGISTERED OCCUPATIONAL THERAPIST
CANADIAN CERTIFIED LIFE CARE PLANNER, CCLCP**

PERSONAL PROFILE

Senior Occupational Therapist, Canadian Certified Life Care Planner, and Certified Catastrophic Impairment Assessor with over 25 years of experience providing expert consultation, assessment, treatment, and care coordination across private sectors and in the community. Practice areas include auto insurance, including SABS and Tort, medical malpractice, elder care, long term disability, estate litigation, Geriatric Legal Assessments, Future Cost of Care reports, Loss of Service reports, and other medicolegal assessments for both plaintiff and defence referral sources. Extensive clinical expertise includes traumatic brain injury, cognitive impairment, amputations, complex orthopedic injuries, spinal cord injury, multiple trauma, and aging-related conditions, including dementia. Recognized for strong clinical judgment, clear and effective communication, and the ability to work collaboratively with legal professionals, insurers, clients, families, caregivers, and multidisciplinary teams to support rehabilitation, aging in place, litigation, and long term planning.

I have been qualified to provide expert opinion evidence as a Life Care Planner in the Ontario Court of Justice.

PROFESSIONAL EXPERIENCE

Current Occupational Therapist Positions

Lori G. Eisen Occupational Therapy Services, Owner

Feb. 2002-present

- Perform comprehensive functional assessments and provide occupational therapy treatment and case management for individuals with disabilities arising from motor vehicle accidents, accidental shootings, medical malpractice, slip and falls, and aging related issues, including dementia.
- Prepare plaintiff and defence medicolegal occupational therapy reports, Life Care Plans, and Loss of Service reports.
- Conduct in home and job site assessments to evaluate activities of daily living capacity and develop return to activities of daily living and return to work programs.
- Complete ergonomic and home modification assessments, and coordinate implementation of recommended modifications.
- Conduct Independent Medical Examinations and Assessment of Attendant Care Needs, including Form 1 assessments.

Elder Caring Inc.

Jan. 2010-present

- Clinical supervisor for counsellors in the geriatric legal division, providing oversight and guidance grounded in clinical best practices.
- Conduct Geriatric Legal and Functional Living Assessments consisting of comprehensive and objective evaluations that quantify care needs and provide recommendations in the older adult's best interests, particularly in the context of estate litigation and disputes involving powers of attorney or family members.

- Provide geriatric care management and guidance to older adults and their families to help navigate the health care system and make informed decisions that support living well, aging in place or transitions to assisted living settings.
- Support and empower older adults and caregivers in managing age related conditions, including neurodementias, stroke, physical decline, mood disorders, and other cognitive challenges.

Previous Occupational Therapist/Rehabilitation Consultant Positions

Canadian Rehabilitative Consultants **Nov. 1999-Sept. 2004**

- Worked independently as a self-employed occupational therapist and case manager.

The Scarborough Hospital, Employee Rehabilitation Unit **Jan. 2001-Jan. 2002**

- Collaborated as part of a multidisciplinary team to facilitate the safe and timely return to work of injured hospital employees, coordinated modified work programs with the Occupational Health Department, conducted ergonomic assessments and Physical Demands Analyses, provided consultation regarding the selection of safe hospital equipment, delivered individual rehabilitation programs including splinting, and contributed to hospital wide education initiatives related to body mechanics and patient handling.

SOMA Medical Assessments **July 2002-Apr. 2011**

- Worked independently as a self-employed occupational therapist and case manager.

EEA Occupational Therapy Services **Dec. 2002-Dec. 2006**

- Worked independently as a self-employed occupational therapist and case manager.

DAC Assessor, The Ontario March of Dimes **Sept. 2004-Apr. 2006**

- Conducted attendant care DAC assessments to offer an opinion about the quantity of attendant care required by an individual as a direct result of an MVA.

Cira Medical Services [formerly Medisys Corporate Health and Multidisciplinary Assessment Centre (MDAC)] **April 2007- Oct. 2019**

- Worked independently as a self-employed occupational therapist and case manager; performed Assessments for Catastrophic Designation, Life Care Plans, Responding Reports (Life Care Plan Critiques) and Medical Legal Assessments.

IME Plus **June 2009-Mar. 2015**

- Worked as a self-employed occupational therapist; performed Assessments for Catastrophic Designation, Life Care Plans, and Independent Medical Examinations (IMEs).

Audrey Miller & Associates Inc. **Jan. 2010-Dec. 2023**

- Worked independently as a self-employed occupational therapist and life care planner.

Centric Health / Life Mark Health **Mar. 2013-Jan. 2015**

- Worked as a self-employed occupational therapist; performed Assessments for Catastrophic Designation, two-day Situational Assessments, and IMEs.

EDUCATIONAL BACKGROUND AND AWARDS

AMA Guides (4th Edition) Certified Catastrophic Impairment Assessor	2012
• Certified with the American Board of Forensic Professionals (ABFP)	
Certified Canadian Life Care Planner (CCLCP)	2011
• University of Florida	
• Certified with the International Commission on Health Care Certifications (ICHCC)	
Progressive Goal Attainment Program (PGAP)	2008
Ergonomics Certifications, Optimal Performance Consultants	2001
• Advanced Office Ergonomics and Advanced Industrial Ergonomics	
Bachelor of Science Occupational Therapy	1999
• University of Toronto (with honours)	
Honours Bachelor of Arts (Psychology)	1996
• University of Western Ontario (with distinction)	
Ontario Society of Occupational Therapists Student Award (OSOT)	1999
• For outstanding academic achievement and leadership in occupational therapy	
Colleen Tate Memorial Scholarship	1997
• Presented to a student who is nominated by the first-year occupational therapy class to demonstrate characteristics of sensitivity and compassion.	

PROFESSIONAL ACCREDITATIONS AND ASSOCIATIONS

- College of Occupational Therapists (COTO) registration #: G9903958
- Ontario Society of Occupational Therapists (OSOT)
- Founding member of the Independent Occupational Therapists of Ontario (IOTO)
- Ontario Rehab Alliance (ORA)
- Life Care Planning Resource Network
- International Commission on Health Care Certification (ICHCC)
- American Board of Forensic Professionals (ABFP)

ADDITIONAL EDUCATION AND TRAINING (SELECTED)

• The Art & Evidence of Attendant Care Assessments: Defensibility, Discrepancy, and the OT Scope (MLST)	2026
• Cognitive Assessments in Institutional Care	2026
• Everything You Need to Know About Wills and Estate Planning (Western University)	2026
• Risky Business Medical Malpractice Conference (Gluckstein LLP)	2025
• Presenter: Elder Care Tools to Strengthen Your Estate & Litigation Practice (Loopstra Nixon LLP)	2025
• Changes to the Form 53: What Expert Medical Evaluators Need to Know (CSME)	2025
• Estate and Trust Planning Symposium (B'nai Brith of Canada Foundation)	2025
• An Overview of Dementia and Supportive Communication (OSOT)	2025
• From Clinician to Innovator: How AI Is Transforming OT (OSOT)	2025
• Arthritis Care Essentials (OSOT)	2025

- End-of-Life Care and Advance Care Planning (UHN) 2024
- **Presenter:** Utility and Benefits of Geriatric Legal/Functional Living Assessments (Whaley Estate Litigator (WEL) partners) 2024
- Back to School Conference (PIA) 2024
- Ageing Well Together Conference, Regional Geriatric Program (RGP) 2024
- OBIA Provincial ABI Conference: Harnessing the Power after ABI 2023
- Back to School Conference (PIA) 2023
- The Role of Occupational Therapy in Fertility Care (OSOT) 2023
- Medical Malpractice: Case Updates and Practical Tips (Gluckstein LLP) 2022
- BIAPH Health Advocates Education Conference 2022
- Back to School Conference (PIA) 2022
- Canadian Concussion Centre Webinar Series (7 weeks, Sept.-Dec. 2022) 2022
- Denials of OCF-18s: The Treating OT and the IE-OT Perspectives (OSOT) 2022
- Challenges in Performing Functional Assessments in 2021 (CSME) 2021
- CAT Criteria and the Role of the OT in CAT (OSOT) 2021
- Advances in Pain Medicine: What the Expert Assessor Must Know (CSME) 2021
- An Unbiased View of Bias (CSME) 2021
- Handling Difficult Clients (Thomson Rogers Webinar) 2021
- Chronic Pain, Concussions and the MIG (Thomson Rogers Webinar) 2021
- OBIA Provincial ABI Conference 2021
- The Legal Implications of Virtual Treatment and Assessments, Virtual CAT Assessments, and Best Practices for Reporting in a Virtual World (Thomson Rogers Webinars during COVID-19) 2020
- Office Ergonomics for Occupational Therapists (full day workshop, OSOT) 2020
- Home Modifications for Occupational Therapists: A Technical Collaboration (CAOT) 2019
- Back to School Conference (PIA) 2019
- BIAPH Health Advocates Education Conference 2019
- The Markedly Impaired: Obstacles and Opportunities (Oatley Vigmond) 2019
- Relieving Pain and Restoring Function (Oatley Vigmond) 2019
- Catastrophically Impaired: Lessons Learned from Trial (NRIO) 2018
- Navigating the GOSE-E (PIA) 2018
- Accident Benefits Fall Classic (Canadian Defence Lawyers) 2018
- Markedly Impaired: Obstacles and Opportunities (Oatley Vigmond) 2018
- Emerging Technologies and Assessing Neurocognitive Consequences of Concussion, and How They Can Be Used in a Personal Injury Claim (NRIO) 2018
- The Future of the Rehab Community in the Auto Sector (ORA) 2018
- Rehabilitation & Life Care Planning Symposium (DMA Reability) 2018
- Back to School Conference (PIA) 2017
- Preparing Defensible Life Care Plans (Jodi Fischer, two-day course) 2017
- 20 Red Flags in a Life Care Plan (The Expert Institute) 2017
- Annual Canadian Life Care Planning Program (CSME) 2017
- Traumatic Brain Injury Conference (UHN) 2017
- A Year in Review: Understanding the Impact of SABS Changes (PIA) 2017
- Practical Strategies for Experts: Testifying Without Fear (PIA) 2016
- Breaking Barriers Through Research: Home Modifications Reduce Health Care Costs (OSOT Conference) 2016
- Accessibility/Inclusivity and Home Modifications: The Next Frontier (OSOT Conference) 2016

- Back to School Conference (PIA) 2016
- Innovative Ideas - SABS Changes and Implications for Children and Youth (NRIO) 2016
- Canadian Life Care Planning: Addressing Damages in 2016 (CSME course) 2016
- SABS changes and Attendant Care Needs (NRIO breakfast seminar) 2016
- Rehabilitation & Life Care Planning Symposium (DMA Rehability, two-days) 2016
- Kitty/CAT: The New and the Old (Medical Legal Society of Toronto) 2016
- Colouring Between the Lines - Emergent SABS issues, Expert Tax Tips, Policies & Procedures (ORA Workshop) 2015
- Back to School Conference (PIA) 2015
- Rehabilitation & Life Care Planning Symposium (DMA Rehability, two-days) 2015
- Headaches 101: Complaints, Late Payments, On-Site FSCO Inspections (ORA) 2015
- Challenges of Dementia Care (OSOT Webinar) 2015
- Privacy, Informed Consent & Disclosure (ORA Workshop) 2014
- Consent and Capacity Law (OSOT Workshop) 2014
- Fitness to Drive Screening Measure for At-Risk Drivers (OSOT Workshop) 2014
- Choosing Cognitive Assessments - Using Everyday Tasks to Treat Cognitive Deficits (Debby McQuillan, two-day training program) 2014
- Rehabilitation & Life Care Planning Symposium (DMA Rehability, two-days) 2014
- Standardizations & Foundations in Life Care Planning (Paul Deutsch, LCP Symposium) 2014
- Canadian Trends in Life Care Planning (Michael Lacerte, LCP Symposium) 2014
- Life Care Planning and Co-Morbid Conditions (Barbara Baptiste, LCP Symposium) 2014
- Providing Expert Opinion: When Providers Go to Court (Personal Injury Alliance/Ontario Rehab Alliance) 2014
- Integrating Evidence-Based Practice and Validity Testing in Mild ABI, Post-Concussion Syndrome, Chronic Pain Syndrome and PTSD 2013
- Rehabilitation & Life Care Planning Symposium (DMA Rehability, two-days) 2013
- Chronic Pain and Depression (Workshop at LCP Symposium) 2013
- Management of Chronic Pain (Workshop at LCP Symposium) 2013
- Life Care planning: The Canadian Perspective (Dana Weldon, LCP Symposium) 2013
- Pediatric Life Care Plans: Potential Ethical Considerations (LCP Symposium) 2013
- Quantifying Housekeeping Costs in the Life Care Plan (Jodi Fischer, LCP Symposium) 2013
- A Defense Response to a Life Care Plan (Workshop at LCP Symposium) 2013
- Conventional, Rehabilitative and State of the Art Upper and Lower Limb Prostheses (Loewen Prosthetics) 2013
- Auto Insurance: New Changes, New Issues (Oatley Vigmond) 2012
- Managing your Spinal Cord Injury to Independence (Back to School Conference) 2012
- Canadian Life Care Planning: Review of Legal Principles (CSME) 2012
- OSOT Conference: Building Together 2012
- The Chronic Pain Service: An Innovative Model of Self-Management (OSOT Workshop) 2012
- The MAT Assessment: Seating and Mobility (OSOT Workshop/Motion Specialties) 2012
- Clinical Reasoning from Crayons to Computers – Handwriting and Assistive Technology (OSOT Workshop) 2012
- AMA Guides to Impairment Rating, 4th Edition 2011
- Catastrophic Brain Impairment: Children, Young Adults and their Families – Rehabilitation Strategies (Thompson Rogers, Back to School Conference) 2011
- OSOT Auto Sector Workshop – Impacts of Regulatory Change, Assessment of Attendant Care Needs, Qualifying as an Expert Witness, and Mock Trial 2011

- Module 1: Fundamentals of Life Care Planning (International Commission on Health Care Certification, ICHCC) 2010
- Module 2: Medical and Psychological Aspects of Life Care Planning with Spinal Cord Injury (University of Florida) 2010
- Module 3: Medical and Psychological Aspects of Life Care Planning with Brain Injury (University of Florida) 2010
- Module 4: Medical and Psychological Aspects of Life Care Planning with Amputations and Burns (University of Florida) 2010
- Module 5: Medical and Psychological Aspects of Life Care Planning with Multiple Disabilities (University of Florida) 2010
- Module 6: Vocational and Forensic Aspects of a Life Care Plan (University of Florida) 2010
- Traumatic Brain Injury and Mental Health – Overview, Impact and Management (St. Michael's Hospital) 2010
- New Directions in the Changing World of Auto Insurance: New SABS, New Rules of Civil Procedure, Renewed HCAI (OSOT Conference) 2010
- Cognitive Issues in Older Adults (OSOT Workshop) 2010
- Future Care Costing: New Challenges in a Changing Environment (OSOT Workshop) 2010
- Diagnosis: More than Just Words (OSOT Workshop) 2010
- Psychotherapy and OT (OSOT Workshop) 2010
- Attendant Care Assessments & Assistive Goods (Ability Health Care) 2010
- Navigating the New SABS: Practical Solutions (Thompson Rogers & Toronto ABI Network Conference) 2010
- So You Think You Have Written an Expert Report? (CSME) 2010
- Cognitive Rehabilitation and the Multi-Context Approach to Executive Dysfunction, Awareness and Memory (two-day course, Joan Toglia/Mindworks) 2009
- OSOT Conference on Completion of the Form 1 2009
- OBIA's Brain Basics: A Two-Day Workshop on Understanding and Treating ABI (Ontario Brain Injury Association) 2009
- Are You Prepared for Changes in Auto Insurance Legislation? (Thompson Rogers, Back to School Workshop) 2009
- Two-Day Skills Training for the Progressive Goal Attainment Program (PGAP) 2008
- Catastrophic or Non-Catastrophic? Applying the AMA Guides to Real Cases 2008
- Identifying and Managing Chronic Pain Conditions (OSOT Workshop) 2008
- Return to Work Following ABI (OSOT Workshop) 2008
- One Year Later: Practical Solutions in the Auto Sector (OSOT Workshop) 2007
- Auto Sector Update – Regulation Changes Impact on OT (OSOT Workshop) 2006
- Cognition: Using Every Day Items to Treat Deficits (William Osler Health Centre) 2005
- OT Practice in Ontario's Changing Auto Sector (OSOT Workshop) 2003
- Bill 198: A Claimant's Perspective (OSOT Workshop) 2003
- WSIB Programs of Care - Low Back Injuries and Chronic Pain Programs of Care (OSOT Workshop) 2003
- Chronic Non Malignant Pain Following Soft Tissue Injury (University of Toronto) 2002
- Occupational Therapy within the Auto Sector (COTO) 2001
- ARCON Certification (Functional Abilities Evaluations), VERNOVA 2001