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**AOTA Occupational Profile Template**

“The occupational profile is a summary of a client’s (person’s, group’s, or population’s) occupational history and experi-ences, patterns of daily living, interests, values, needs, and relevant contexts” (AOTA, 2020, p. 21). The information is obtained from the client’s perspective through both formal and informal interview techniques and conversation.

The information obtained through the occupational profile contributes to a client-focused approach in the evaluation, intervention planning, intervention implementation, and discharge planning stages. Each item below should be addressed to complete the occupational profile. Page numbers are provided to reference the description in the *Occupational Therapy Practice Framework: Domain and Process* (4th ed.; AOTA, 2020).

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| **OCCUPATIONAL PROFILE** |
| **Client Report** | **Reason the client is seeking service and concerns related to engagement in occupations****(p. 16)** | Why is the client seeking services, and what are the client’s current concerns relative to engaging in occupations and in daily life activities? (This may include the client’s general health status.) |
| **Occupations in which the client is successful and barriers impacting success (p. 16)** | In what occupations does the client feel successful, and what barriers are affecting their success in desired occupations? |
| **Occupational history (p. 16)** | What is the client’s occupational history (i.e., life experiences)? |
| **Personal interests and values (p. 16)** | What are the client’s values and interests? |
| **Contexts** |  | What aspects of their contexts (environmental and personal factors) does the client see as supporting engagement in desired occupations, and what aspects are inhibiting engagement? |
| **Environment (p. 36)****(e.g., natural environment and human-made changes, products and technology, support and relationships, attitudes, serv- ices, systems and policies)** | Supporting Engagement | Inhibiting Engagement |
| **Personal (p. 40)****(e.g., age, sexual orientation, gender identity, race and ethni- city, cultural identification,** **social background, upbringing, psychological assets, educa- tion, lifestyle)** | Supporting Engagement | Inhibiting Engagement |

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| **Performance Patterns** | **Performance patterns (p. 41) (e.g., habits, routines, roles, rituals)** | What are the client’s patterns of engagement in occupations, and how have they changed over time? What are the client’s daily life roles? (Patterns can support or hinder occupational performance.) |
| **Client Factors** |  | What client factors does the client see as supporting engagement in desired occupations, and what aspects are inhibiting engagement (e.g., pain, active symptoms)? |
| **Values, beliefs, spirituality (p. 51)** | Supporting Engagement | Inhibiting Engagement |
| **Body functions (p. 51)****(e.g., mental, sensory, neuro- musculoskeletal and movement-related, cardiovascular functions)** | Supporting Engagement | Inhibiting Engagement |
| **Body structures (p. 54)****(e.g., structures of the nervous system, eyes and ears, related to movement)** | Supporting Engagement | Inhibiting Engagement |
| **Client Goals** | **Client’s priorities and desired targeted outcomes (p. 65)** | What are the client’s priorities and desired targeted outcomes related to the items below? |
| Occupational Performance |
| Prevention |
| Health and Wellness |
| Quality of Life |
| Participation |
| Role Competence |
| Well-Being |
| Occupational Justice |

For a complete description of each component and examples of each, refer to the *Occupational Therapy*

*Practice Framework: Domain and Process* (4th ed.).

**Resources**

American Occupational Therapy Association. (2020). Occupational therapy practice framework: Domain and process (4th ed.). *American Journal of Occupational Therapy, 74* (Suppl. 2), 7412410010. <https://doi.org/10.5014/ajot.2020.74S2001>.

American Occupational Therapy Association. (2021). Improve your documentation and quality of care with AOTA's updated occupational profile template. American Journal of Occupational Therapy, 75 (Suppl. 2), 7502420010. doi: <https://doi.org/10.5014/ajot.2021.752001>

The occupational therapy evaluation and re-evaluation CPT® codes established in 2017 require the inclusion of an occupational profile. For more information visit <https://www.aota.org/practice/practice-essentials/coding>.

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