“The occupational profile is a summary of a client’s (person’s, group’s, or population’s) occupational history and experiences, 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).

<table>
<thead>
<tr>
<th>OCCUPATIONAL PROFILE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Reason the client is seeking service and concerns related to engagement in occupations (p. 16)</strong></td>
</tr>
<tr>
<td><strong>Occupations in which the client is successful and barriers impacting success (p. 16)</strong></td>
</tr>
<tr>
<td><strong>Occupational history (p. 16)</strong></td>
</tr>
<tr>
<td><strong>Personal interests and values (p. 16)</strong></td>
</tr>
<tr>
<td><strong>Environment (p. 36)</strong> (e.g., natural environment and human-made changes, products and technology, support and relationships, attitudes, services, systems and policies)</td>
</tr>
<tr>
<td><strong>Contexts</strong></td>
</tr>
<tr>
<td><strong>Personal (p. 40)</strong> (e.g., age, sexual orientation, gender identity, race and ethnicity, cultural identification, social background, upbringing, psychological assets, education, lifestyle)</td>
</tr>
</tbody>
</table>
### 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

**Values, beliefs, spirituality (p. 51)**

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)

**Body functions (p. 51)**  
(e.g., mental, sensory, neuromusculoskeletal 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**


The occupational therapy evaluation and reevaluation CPT® codes established in 2017 require the inclusion of an occupational profile. For more information, visit [https://www.aota.org/coding](https://www.aota.org/coding).