

AOTA OCCUPATIONAL PROFILE TEMPLATE

“The occupational profile is a summary of a client’s occupational history and experiences, patterns of daily living, interests, values, and needs” (AOTA, 2014, p. S13). The information is obtained from the client’s perspective through both formal interview techniques and casual conversation and leads to an individualized, client-centered approach to intervention.

Each item below should be addressed to complete the occupational profile. Page numbers are provided to reference a description in the *Occupational Therapy Practice Framework: Domain and Process, 3rd Edition* (AOTA, 2014).

Client Report	Reason the client is seeking service and concerns related to engagement in occupations	Why is the client seeking service, 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 (p. S5)	In what occupations does the client feel successful, and what barriers are affecting his or her success?	
	Personal interests and values (p. S7)	What are the client’s values and interests?	
	Occupational history (i.e., life experiences)	What is the client’s occupational history (i.e., life experiences)?	
	Performance patterns (routines, roles, habits, & rituals) (p. S8)	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.)	
Environment	What aspects of the client’s environments or contexts does he or she see as:		
		Supports to Occupational Engagement	Barriers to Occupational Engagement
	Physical (p. S28) (e.g., buildings, furniture, pets)		
	Social (p. S28) (e.g., spouse, friends, caregivers)		
	Cultural (p. S28) (e.g., customs, beliefs)		
Context	Personal (p. S28) (e.g., age, gender, SES, education)		
	Temporal (p. S28) (e.g., stage of life, time, year)		
	Virtual (p. S28) (e.g., chat, email, remote monitoring)		
Client Goals	Client’s priorities and desired targeted outcomes: (p. S34)	Consider: occupational performance—improvement and enhancement, prevention, participation, role competence, health and wellness, quality of life, well-being, and/or occupational justice.	

ADDITIONAL RESOURCES

For a complete description of each component and examples of each, refer to the *Occupational Therapy Practice Framework: Domain and Process, 3rd Edition*.

American Occupational Therapy Association. (2014). Occupational therapy practice framework: Domain and process (3rd ed.). *American Journal of Occupational Therapy, 68*, S1–S48. <https://doi.org/10.5014/ajot.2014.682006>

The occupational profile is a requirement of the CPT® occupational therapy evaluation codes as of January 1, 2017. For more information visit www.aota.org/coding.