

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.) Client referred due to illegible handwriting and poor self-regulation. He says his work "isn't as neat" as others'. He wants to have his work hung on the classroom showcase bulletin board and "clip up to fantastic" (achieve a higher level in the classroom behavior management system).	
	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? Physical education, soccer, identifies as the "fastest kid around," math, reading. Barriers: Time to complete school work	
	Personal interests and values (p. S7)	What are the client’s values and interests? Values: Time with family, being a "good" student. Interests: Sports, pet lizard, math, reading	
	Occupational history (i.e., life experiences)	What is the client’s occupational history (i.e., life experiences)? Lives with mom, dad, and older sister. History of success in school, completes chores at home, plays soccer.	
	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.) Length of school day has been stable since kindergarten. Homework and soccer practice have increased significantly this year (1 worksheet a day, spelling, 20 min of reading, practice math fluency). He has soccer practice 2x weekly and weekend games. ROLES: Son, brother, soccer player, friend, and student. STUDENT ROLE: He feels the "clip chart," time constraints with assignments, no warnings when changing activities, and use of crayons (versus markers) 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)	The site word wall supports his efforts in spelling and reading. Sits near teacher’s desk at front of class, which allows teacher interaction.	Clip chart, showcase board, crayons (when coloring, he applies extreme pressure to achieve vibrant colors). No warning to switch activities results in anger & "clipping down."
Social (p. S28) (e.g., spouse, friends, caregivers)	Classmates, teacher, before/after school teachers are supportive. Home behavior system—His parents give him time warnings to plan for switching activities.	He strongly dislikes "clipping down" in front of his friends. Sister had the same teacher in 2nd grade without incident.	
Context	Cultural (p. S28) (e.g., customs, beliefs)	He strongly values being a good student and wants to be successful at "clipping up" to "fantastic."	Being seen "clipping down" by friends exacerbates anger and stress.
	Personal (p. S28) (e.g., age, gender, SES, education)	Second grader. He has demonstrated and felt success in school until now.	None identified
	Temporal (p. S28) (e.g., stage of life, time, year)	During soccer season, he thrives during practice and games.	Client feels that he does not have enough time to complete journaling because it takes him longer to make his work neat.
	Virtual (p. S28) (e.g., chat, email, remote monitoring)	His teacher has regular email contact with parents, providing updates on self-regulation.	None identified
Client Goals	<p style="background-color: #e6f2ff;">Client’s priorities and desired targeted outcomes: (p. S34)</p> <p>Consider: occupational performance—improvement and enhancement, prevention, participation, role competence, health and wellness, quality of life, well-being, and/or occupational justice. The client wants to be able to complete neat work so it can be hung on the teacher’s "showcase" bulletin board. He also wants to be able to "clip up" to "fantastic" or at least keep his clip at the same position (avoiding "clipping down").</p>		

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.