



DOCUMENTATION ASSIGNMENT: Occupational Profile and Treatment Planning

Learning objectives:

Upon completion of this assignment, the successful student will be able to:

1. Write an occupational profile summary for an individual with multiple sclerosis.
2. Create three short-term goals that are measurable, functional, and realistic with a clear timeline.
3. Design an appropriate one-hour treatment for an individual with multiple sclerosis.
4. Critically analyze documentation and provide peer feedback in a constructive manner.

Assignment Overview

Complete the following three forms using the five ICE videos below:

1. **AOTA Occupational Profile Template** (AOTA, 2020a).
2. **Treatment Plan Worksheet** on page 3.
3. **Peer Feedback Checklist** on page 4.



Multiple Sclerosis, Problems Observed in the Home: Part 1

3:26

A woman diagnosed with multiple sclerosis describes how weakness, fatigue, and the symptoms of her disease impact her work as an artist and her...



Multiple Sclerosis, Problems Observed in the Home: Part 2

1:48

An artist, diagnosed with multiple sclerosis, has difficulty standing due to fatigue. She shares her concerns about safety and the need to modify her...



Multiple Sclerosis, Problems Observed in the Home: Part 3

2:48

Kitchen activities have become both difficult and unsafe for a woman diagnosed with multiple sclerosis. She demonstrates how weakness and lo...



Multiple Sclerosis, Problems Observed in the Home: Part 4

2:18

A woman with multiple sclerosis demonstrates how she has learned to adapt her environment and her kitchen routine to accommodate the changes in he...



Multiple Sclerosis, Problems Observed in the Home: Part 5

2:16

The need to do physically demanding activities at home, such as cleaning the bathtub, may require the help of a therapist to problem solve and determine ...

Log into the [ICE Learning Center](#).
Find the videos by typing "multiple sclerosis" in the search box.

Case Scenario:



Marsha S. is a 67yo WF with recent MS exacerbation and a history of carpal tunnel and asthma. She is a widow who lives alone with nearby family that check in regularly. She is retired and has an undergraduate art degree in printmaking and bookbinding. Home Health OT was consulted for evaluation, treatment, and home safety evaluation. You will learn more about Marsha's occupations, contexts, performance patterns and skills, and client factors in the videos below.

Task 1: Complete an Occupational Profile.

- Complete the **AOTA Occupational Profile Template** (AOTA, 2020a), **available online** in [pdf](#) or [Word format](#).
- “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, 2020b, p. 21) and should be included in every occupational therapy evaluation to promote client-centered treatment.
- [Examples of occupational profiles](#) are also available on the AOTA website.
- **Submit completed template via _____ by assignment due date.**

Task 2: Create a Treatment Plan.

- Create a comprehensive plan using the **Treatment Plan Worksheet** provided on the next page.
- Be sure that your three OT goals are measurable, functional, and realistic.
- Timeline for goals can be 1 week, 2 week, 4 sessions, etc.
- Be specific and clear about what you would do with the client during your one-hour treatment session so that another therapist could pick up your plan and easily carry it out.
- Feel free to add pictures, website links, or handouts (add an addendum if needed).
- **Submit completed worksheet via _____ by assignment due date.**

Task 3: Give Peer Feedback.

- Constructive feedback will be provided shortly after submitting Tasks 1 and 2 using the **Peer Feedback Checklist** on page 4. You can also use this checklist to check your own work prior to submission.
- Feedback will be used to generate discussion/questions in lab and will not negatively affect the peer’s grade.
- **The Peer Feedback Checklist will be completed on paper during lab.**

References

- American Occupational Therapy Association. (2020a). 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. (2020b). *AOTA occupational profile template*. <https://www.aota.org/-/media/Corporate/Files/Practice/Manage/Documentation/AOTA-Occupational-Profile-Template.pdf>

Task 1: Occupational Profile Template

Go to the AOTA website to access the fillable template: <https://www.aota.org/-/media/Corporate/Files/Practice/Manage/Documentation/AOTA-Occupational-Profile-Template.pdf>.



aota.org

AOTA Occupational Profile Template

“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).

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 affecting 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, services, systems and policies)	Supporting Engagement	Inhibiting Engagement
	Personal (p. 40) (e.g., age, sexual orientation, gender identity, race and ethnicity, cultural identification, social background, upbringing, psychological assets, education, lifestyle)	Supporting Engagement	Inhibiting Engagement

Task 2: Treatment Plan Worksheet

TREATMENT PLAN WORKSHEET

Client initials:	Age:	Gender:	Therapist: (enter student name here)
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Primary Diagnosis:

Past Medical History:

Precautions:

List 2 specific problems that the client mentioned:	List a <u>new</u> solution to address each problem:
1.	
2.	

Short-Term Occupational Therapy Goals:

- 1.
- 2.
- 3.

ONE-HOUR TREATMENT PLAN

Time (#min)	Activity	How to grade up	How grade down
(e.g., 5min)			

Task 3: Peer Feedback Checklist

Place a check (✓) if expectation is met, (X) if expectation is not met, and (?) if you are not sure or have a question. Add comments as needed. Feedback will be used to generate discussion/questions in lab and will not negatively affect your peer's grade.

OCCUPATIONAL PROFILE:

	Describes the client's occupational history and experiences, patterns of daily living, interests, values and needs. Includes information about what is currently important and meaningful to the client and identifies past experiences and interests that may assist the therapist in understanding current issues and problems. Includes the client's priorities and desired outcomes/goals (client-centered).
	Easy to read and understand.

Comments:

SHORT-TERM GOALS:

	Lists 3 short term occupational therapy goals.
	Goals have a <u>time frame</u> that is written in the same location for all goals (beginning or end).
	Goals are <u>measurable</u> (you can easily tell what is needed for a goal to be considered "met"). This includes using a FIM/GG score for all action-oriented goals.
	Goals are <u>realistic</u> (as best you can tell).
	Goals are <u>functional</u> (either written about a functional activity or specifically says it is "in prep for" functional activity).
	Goals are client-centered and relate to the client's personal goals in the videos.
	Goals are easy to read and make logical sense.

Comments:

ONE-HOUR TREATMENT PLAN:

	The time allotted for each activity adds up to one hour (breaks and flex time is allowed).
	Activities are client-centered and related to client goals (either directly related or preparatory).
	Activities are clearly explained so that if needed to add this patient to your caseload, you could carry out the treatment plan.
	Options for grading up and grading down activities are appropriate and make logical sense.

Comments:

The Occupational Profile and Treatment Plan was written by (student name) _____
and reviewed by (peer name) _____.

Grading Rubric

Task	Point value
<p>Task 1: Complete an Occupational Profile.</p> <p>Fully completed the online AOTA Occupational Profile Template. Described the client's occupational history and experiences, patterns of daily living, interests, values and needs. Included information about what is currently important and meaningful to the client and identifies past experiences and interests that may assist the therapist in understanding current issues and problems. Included the client's priorities and desired outcomes/goals (client-centered). Easy to read and understand. Submitted on time.</p>	<p>____/40</p>
<p>Task 2: Create a Treatment Plan.</p> <p>Fully completed Treatment Plan Worksheet. Suggested at least two creative solutions to the client's identified ADL problems. Included three short-term OT goals that are measurable, realistic, functional, and have a time frame. Goals are easy to read, logical, client-centered, and relate to client's personal goals. Designed a clear 1-hr treatment plan that would be easy to carry out based on what is written. Graded the activities up and down appropriately. Submitted on time.</p>	<p>____/40</p>
<p>Task 3: Give Peer Feedback.</p> <p>Fully completed the Peer Feedback Checklist. Identified strengths and areas for improvement in a positive, constructive way. Used feedback to generate discussion in class on areas that need clarification when needed. Delivered feedback professionally 1:1 to partner. Submitted on paper at the end of lab.</p>	<p>____/20</p>
<p>TOTAL</p>	<p>____/100</p>