



THE AMPLIFY THERAPY SUMMIT 2026

Is It Coaching or Is It OT?



Scope, Ethics, Pros, and Cons of the Coaching Model

Jaclyn Schwartz, PhD, OTR/L, FAOTA, NBC-HWC

Program Director

Just for OT: Practitioner to Coach Program



A little about me

- Occupational therapy practitioner for 15+ years
- PhD with federally funded research and peer-reviewed publications
- National Board Certified Health and Wellness Coach (NBC-HWC)
- **Disclosure:** I direct an NBHWC-accredited program that trains occupational therapy practitioners to coach, and I host The Health Coach OT podcast

● BEFORE WE START

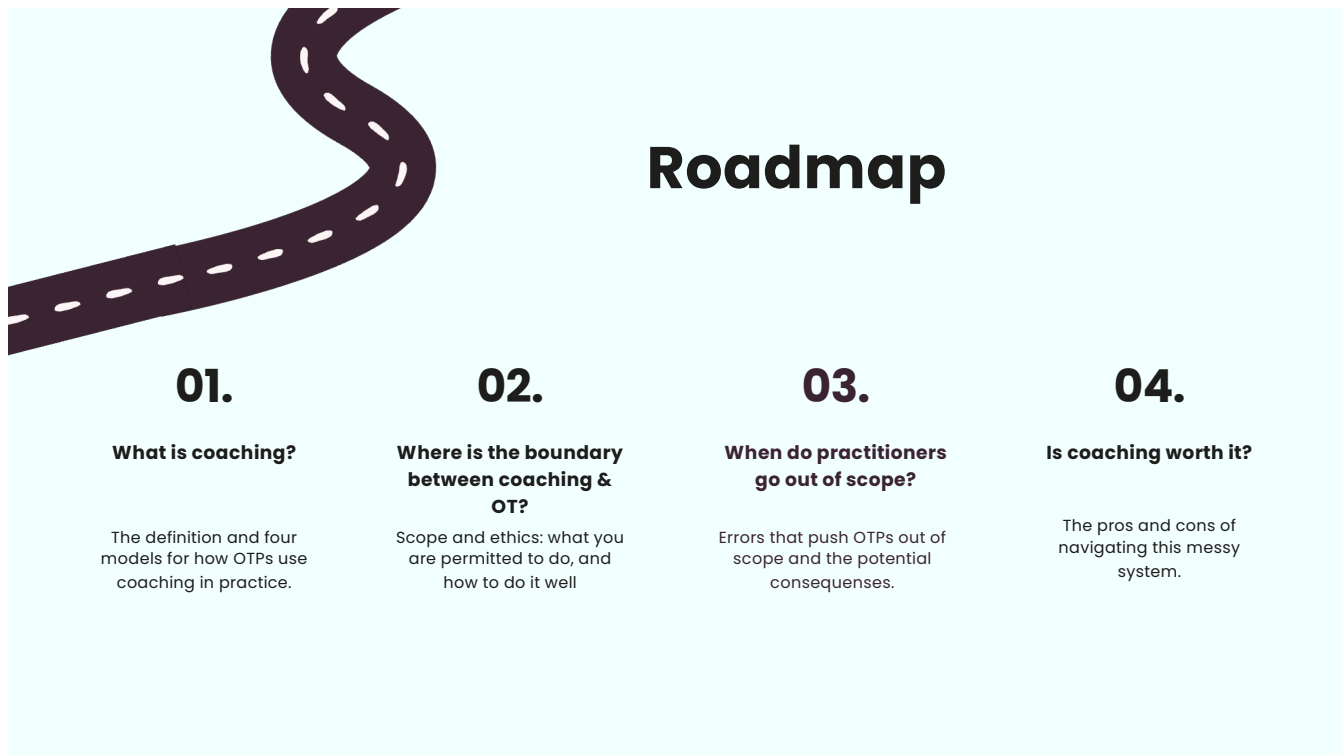
A quick disclaimer

- Occupational therapy practice is regulated at the state level
- Practice acts and board interpretations vary from state to state
- This session provides general education, not state-specific legal guidance
- **You are responsible for practicing in accordance with your own state OT practice act**
- **This is not legal or business advice; please consult a professional**

● LEARNING OBJECTIVES

By the end of this hour, you will be able to:

- Describe coaching as an occupational therapy intervention
- Distinguish coaching as an intervention from coaching as a model of practice
- Determine when coaching is the right approach, and when it is not





Health coaching is a multi-billion-dollar field, growing fast.

LaRosa, J. (2024). The U.S. health coaching market. Marketdata LLC.
<https://www.marketdataenterprises.com/category/health-coaching-market/>

● THE LANDSCAPE

And that wave is flowing into OT

- Coaching as an occupational therapy intervention is growing quickly
- A 2024 scoping review mapped increase in coaching in OT
- At the same time, more practitioners are building standalone coaching practices

Graham, F., Kessler, D., Nott, M., Bernie, C., Kanagasabai, P., & Barthow, C. A. (2024). A scoping review of coaching in occupational therapy: Mapping methods, populations and outcomes. *Australian Occupational Therapy Journal*, 71(6), 1106-1130.
<https://doi.org/10.1111/1440-1630.12991>



There is no single set of coaching standards or regulation enforceable by law.

So, is it up to us as ethical practitioners to get it right.



Health and wellness coaching is an evidence-based, client-centered processes that facilitates and empowers clients to develop and achieve self-determined, health and wellness goals.

National Board for Health & Wellness Coaching. (n.d.). Scope of practice. <https://nbhwc.org>

● DEFINING COACHING IN OT

In OT, it's coaching when it includes all four

- Collaborative goal setting
- Shared problem solving
- Client-directed action planning
- Emphasis on self-efficacy and autonomy

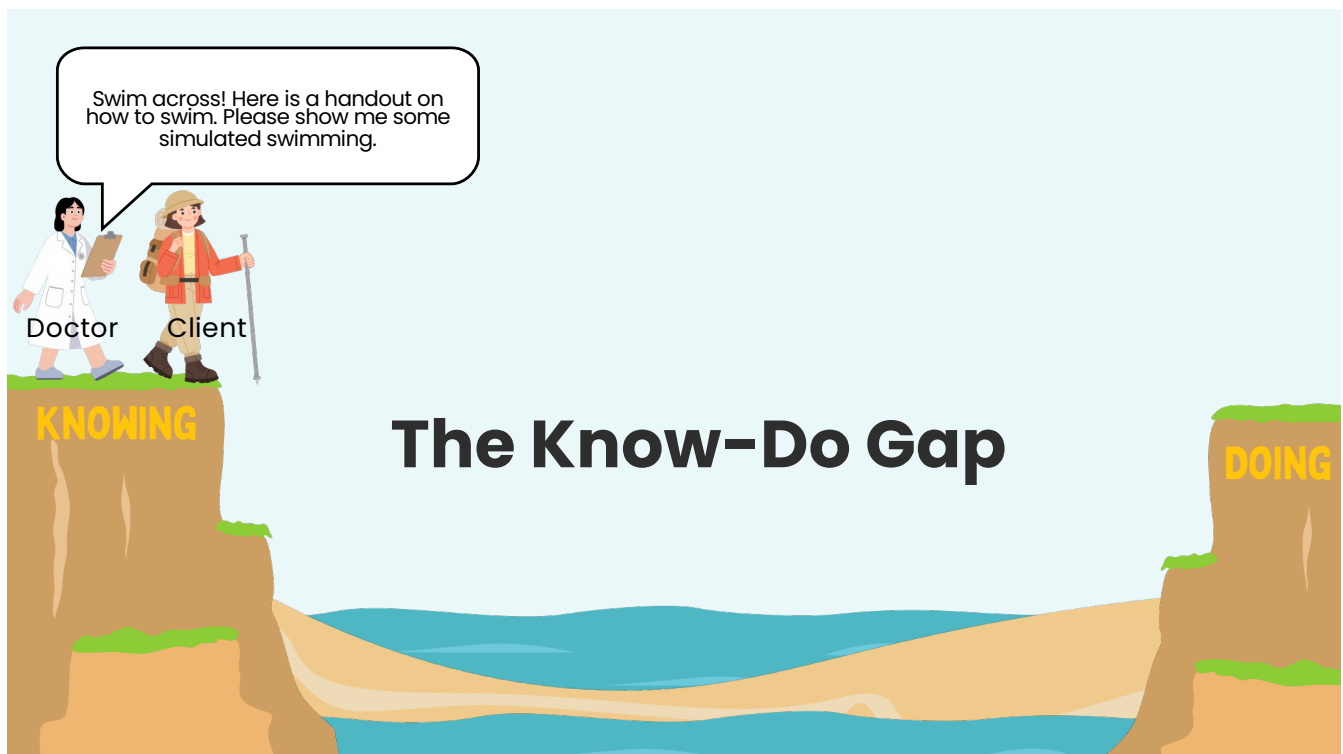
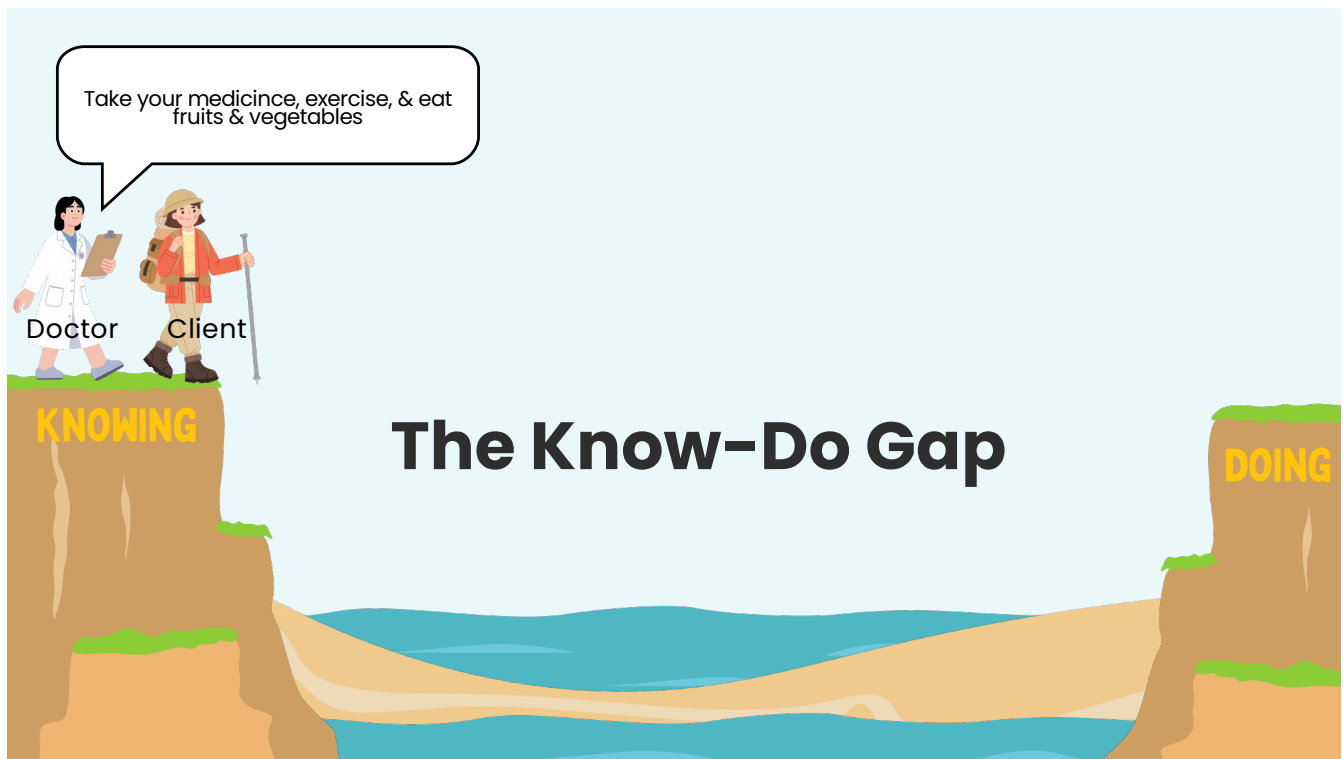
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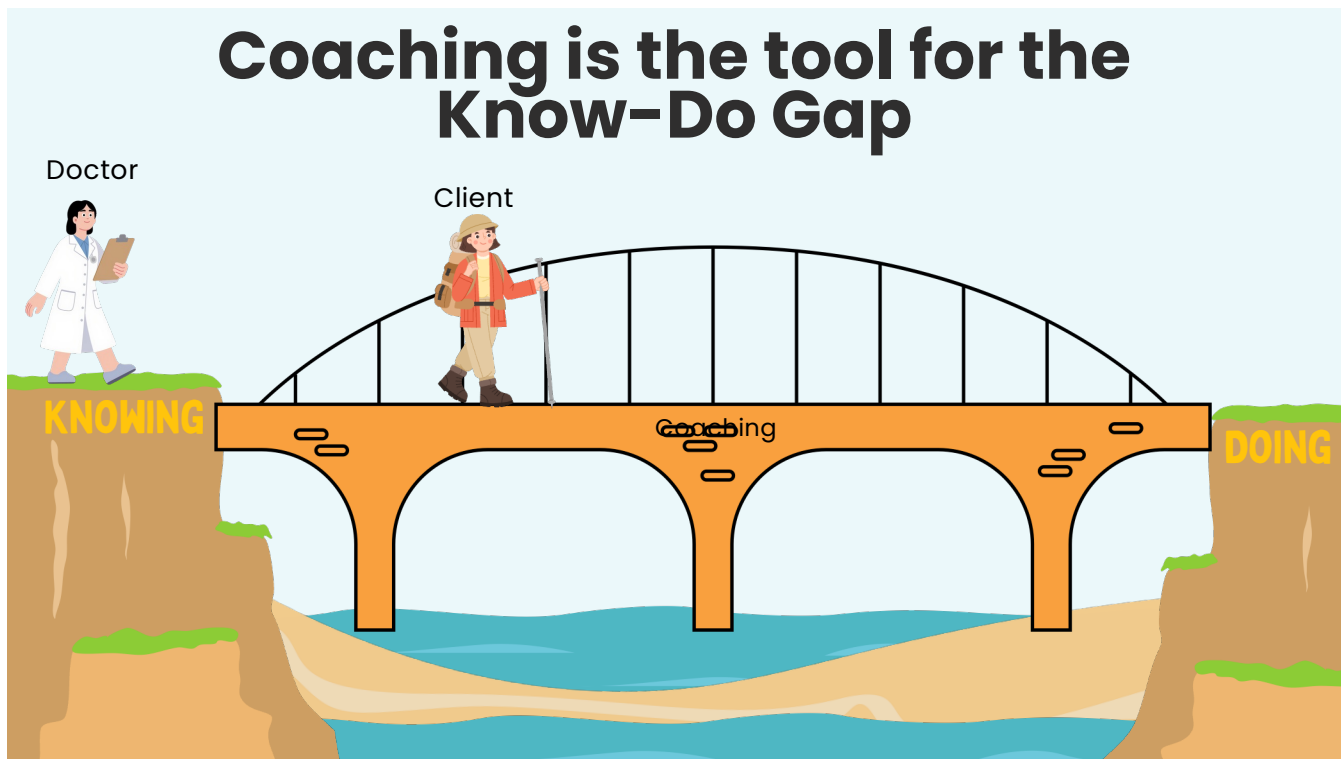
● DEFINING COACHING IN OT

What each criterion really means

- Collaborative goal setting: the client names what matters, you don't prescribe it
- Shared problem solving: you explore options together, the client isn't passive
- Client-directed action planning: the client chooses the next step and owns it
- Self-efficacy and autonomy: success is the client believing they can, not compliance

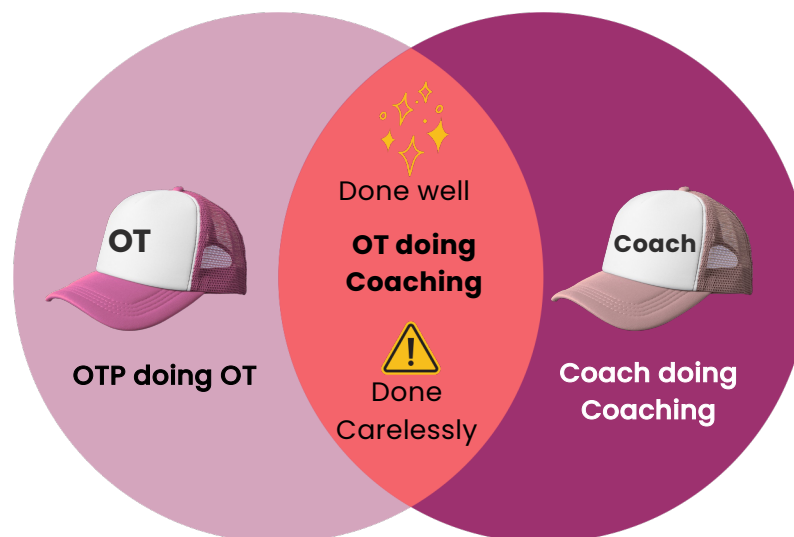
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● THE WHOLE PICTURE

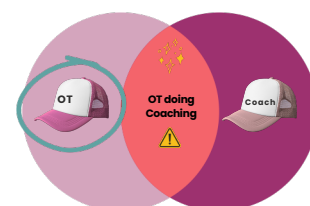
Four Ways OTPs Can Integrate Coaching



● Four Ways OTPs Can Integrate Coaching

OT Practitioners Doing OT

- OT Practitioner hat on
- What
 - Coaching is one of many interventions
 - Examples:
 - Occupational Performance Coaching (OPC)
 - CO-OP: Cognitive Orientation to daily Occupational Performance
 - Strategy training
 - Parent or caregiver training or coaching
 - Includes evaluation & tailored treatment plan
- How
 - Traditional OT setting with traditional billing

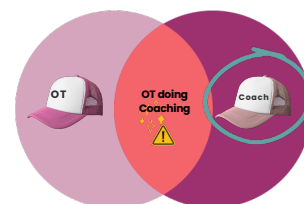


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● Four Ways OTPs Can Integrate Coaching

Coaches Doing Coaching

- OT Practitioner hat removed
- What
 - Coaching is the only intervention
- How
 - Traditional health coaching setting (e.g. private practice, hospital, insurance company, employer-sponsored benefit, health technology)
 - Private pay, employer pay, or insurance sponsored
 - Often on-line across state lines

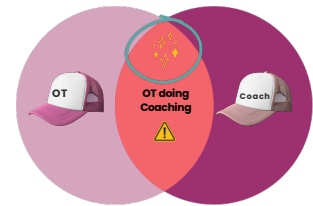


National Board for Health & Wellness Coaching (2025). *Annual survey report: Results from the National Board for Health & Wellness Coaching's 2025 Annual Survey*. <https://nbhwc.org/wp-content/uploads/2026/01/NBHC-Annual-Survey-Report-2025.pdf>

● Four Ways OTPs Can Integrate Coaching

OT Practitioner Doing Coaching (Well)

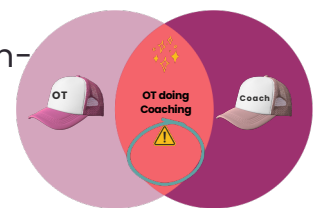
- OT Practitioner hat removed
- What
 - Coaching is the only intervention BUT OT background enhances coaching with sharper questions and better understanding of chronic conditions and disability
- How
 - Private practice or additional service for cash-pay
 - Often diagnosis specific
 - Often online across state lines



● Four Ways OTPs Can Integrate Coaching

OT Practitioner Doing Coaching (Carelessly)

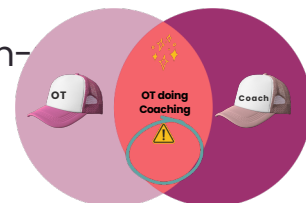
- OT Practitioner hat “removed”
- What
 - Using coaching as one of many interventions
 - Completing a skilled evaluation with a client tailored treatment plan
- How
 - Marketed as coaching
 - Private practice or additional service for cash-
 - Often diagnosis specific
 - Often online across state lines



● Four Ways OTPs Can Integrate Coaching

OT Practitioner Doing Coaching (Carelessly)

- OT Practitioner hat "removed"
- What **(This is still OT)**
 - Using coaching as one of many interventions
 - Completing a skilled evaluation with a client tailored treatment plan
- How **(This is a coaching model of practice)**
 - Marketed as coaching
 - Private practice or additional service for cash-
 - Often diagnosis specific
 - Often online across state lines
- **The what what and the how do not match**



**The label doesn't
determine the
scope. The actions
do.**



● **SCOPE**

OT & Coaching Scope of Practice Differences

	Occupational Therapy	Coaching
Scope of Practice	OT Scope of Practice by AOTA State Board	None required* NBHWC
Evaluation	Yes	No
General Education	Yes	Yes
Hands On Intervention	Yes	No
Tailored Intervention	Yes	No

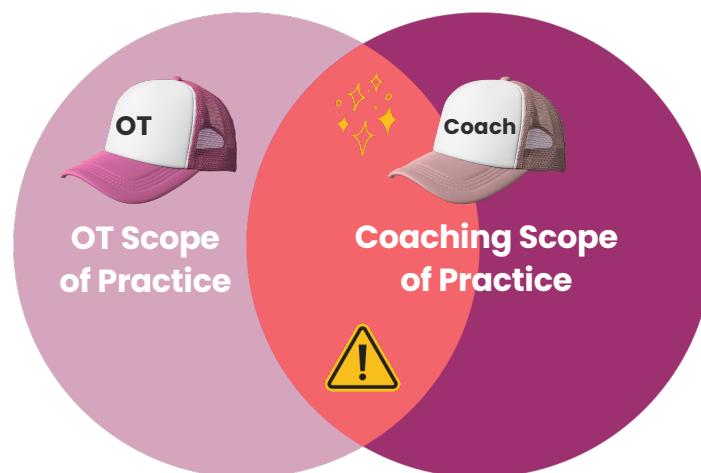
AOTA. (nd). Occupational therapy scope of practice. <https://www.aota.org/practice/practice-essentials/scope-of-practice>
 National Board for Health & Wellness Coaching. (n.d.). Scope of practice. <https://nbhwc.org>

"Health and wellness coaches who hold additional, active, national or state-recognized credentials may provide expert support and guidance within their professional scope for that credential."

National Board for Health & Wellness Coaching. (n.d.). Scope of practice. <https://nbhwc.org>

● SCOPE

Is your OTP Hat On or Off?



AOTA. (nd). Occupational therapy scope of practice. <https://www.aota.org/practice/practice-essentials/scope-of-practice>
 National Board for Health & Wellness Coaching. (n.d.). Scope of practice. <https://nbhwc.org>

● WHERE SCOPE MEETS ETHICS

The AOTA Code of Ethics

- Core principles: beneficence, nonmaleficence, autonomy, justice, veracity, fidelity
- Veracity requires truthful, accurate representation of services
- Justice requires compliance with the laws and regulations governing practice
- These speak directly to how you describe and deliver your work

American Occupational Therapy Association. (2025). AOTA 2025 occupational therapy code of ethics. American Journal of Occupational Therapy, 79(Suppl. 3). <https://doi.org/10.5014/ajot.2025.79S302>

● WHERE SCOPE MEETS ETHICS

NBHC Code of Ethics

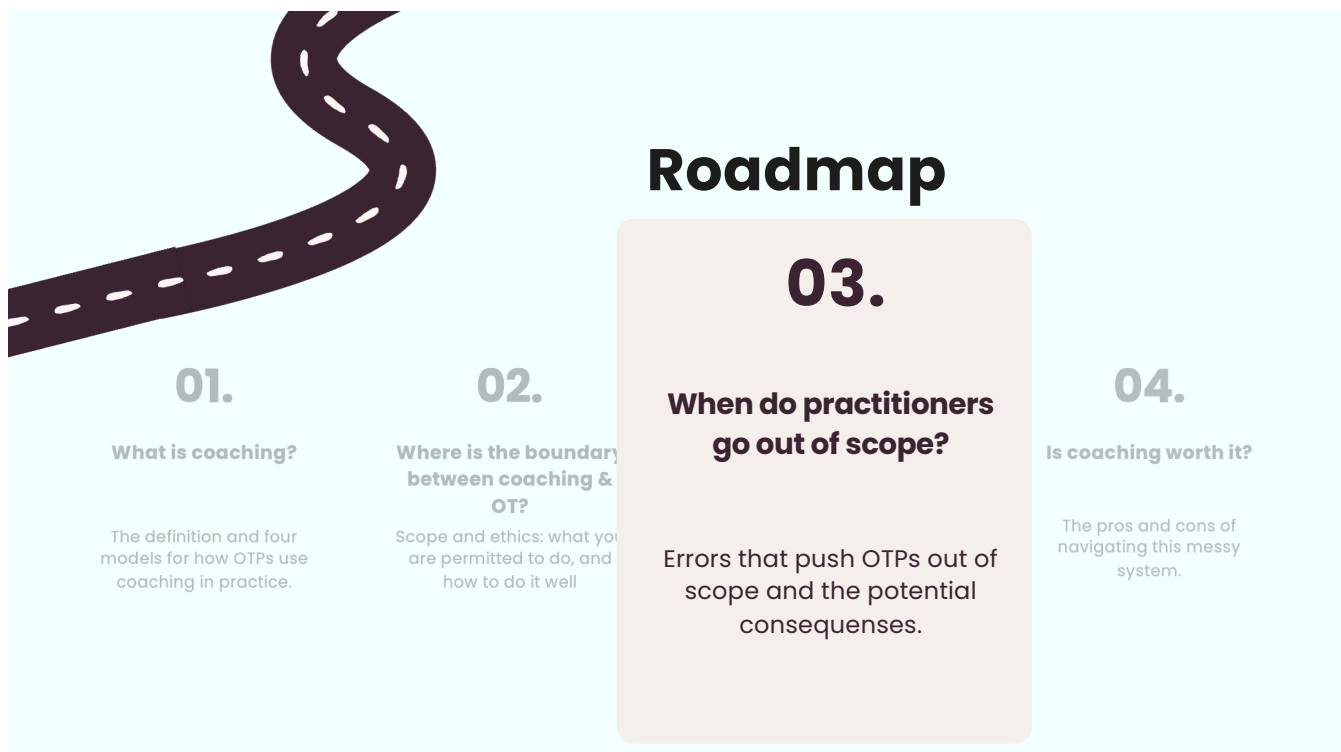
- Accurate representation: describing your services honestly in all communication
- Honoring the scope of any other credential you hold
- Referring out when a client needs something outside the coaching scope
- These are markers of quality, whether or not you hold the NBC-HWC

National Board for Health & Wellness Coaching. (2026). Code of ethics. <https://nbhwc.org/code-of-ethics/>

● WHERE SCOPE MEETS ETHICS

Scope & Ethics Key Takeaway

- You are either working within the OT Scope or not and either choice comes with its own set of barriers and opportunities
- The main scope differentiator is evaluation and a tailored intervention
- Going outside of scope is an ethics violation



● BEFORE WE GO FURTHER

This isn't about blame

- Most practitioners who blur the line got there honestly
- No one taught us exactly where coaching ends and OT begins
- That is precisely why we are drawing the line now, together
- The goal is clarity and empowerment, not judgment

● THE DISTINCTION

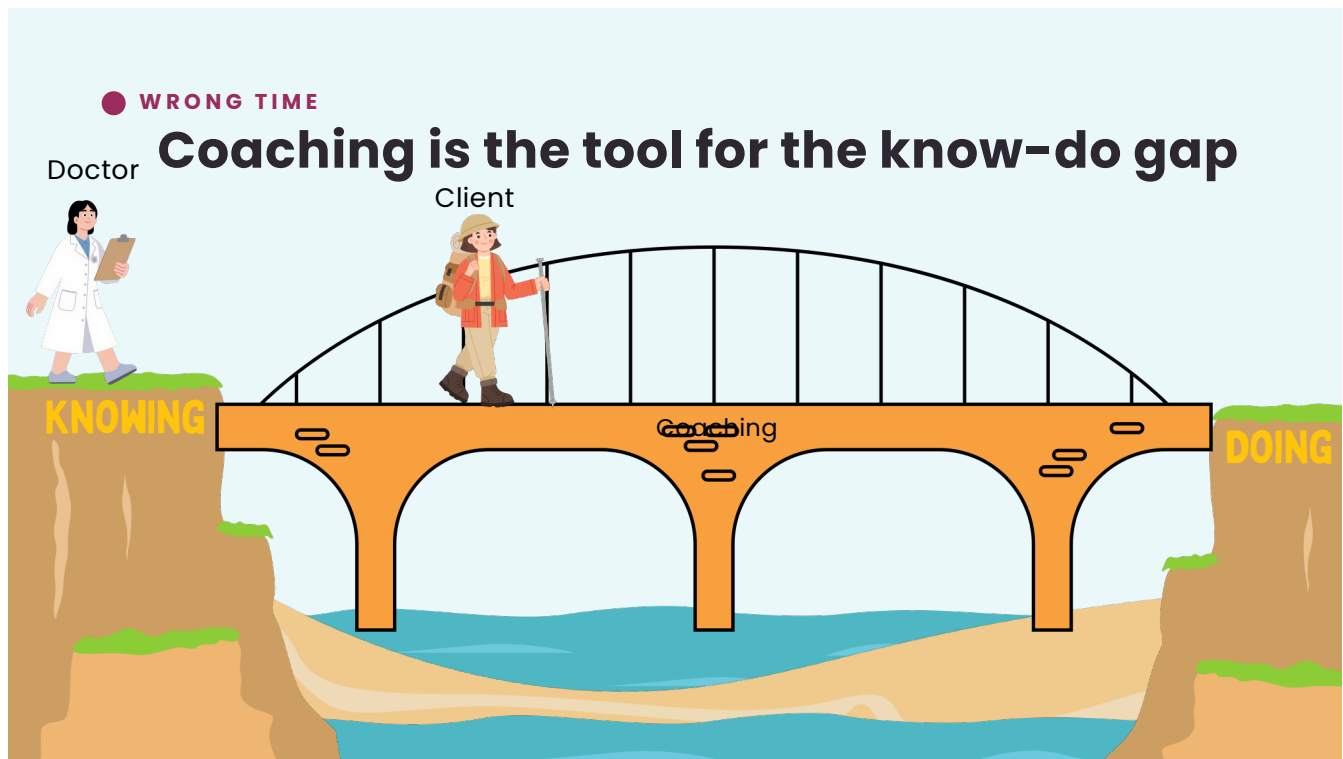
Done well versus done carelessly

Wrong Time

Done well: using coaching at the right time, with skill, and naming your service honestly.

Wrong Name

Done carelessly: reaching for coaching when it isn't the right tool, or letting the label drift from the actions.



● **WRONG NAME**

When the label drifts from the actions

	Occupational Therapy	Coaching
Evaluation	Yes	No
Hands On Intervention	Yes	No
Tailored Intervention	Yes	No

Any of this called coaching is the wrong name

● WHY IS STAYING IN SCOPE IMPORTANT

Why is it important to stay in the correct scope?

- State boards protecting scope of practice
- Ethical practice is essential to maintain your license
- Occupational Therapy scope infringement

Eickhoff-Shemek, J. M. (2025). Scope of Practice for Health and Wellness Coaches: Legal Liability Risks and Risk Management Strategies. ACSM's Health & Fitness Journal, 29(3), 42-46. <https://doi.org/10.1249/FIT.0000000000001053>

● WHY IS STAYING IN SCOPE IMPORTANT

The State Boards Decide When Someone Has Violated Scope

- Are the actions being taken limited, in that state, to **any** licensed professional?
 - E.G. nutrition, PT, athletic training, etc.
- Boards whose scope is violated can impose a cease and desist, fines, or other consequences.

Eickhoff-Shemek, J. M. (2025). Scope of Practice for Health and Wellness Coaches: Legal Liability Risks and Risk Management Strategies. ACSM's Health & Fitness Journal, 29(3), 42-46. <https://doi.org/10.1249/FIT.0000000000001053>

● WHY IS STAYING IN SCOPE IMPORTANT

Going out of scope is an ethics violation

- The AOTA Ethics Committee censure a member or suspend or revoke membership for ethics violations
- The OT Board can censure a practitioner or suspend or revoke licensure for ethics violations

American Occupational Therapy Association. (2025). AOTA 2025 occupational therapy code of ethics. American Journal of Occupational Therapy, 79(Suppl. 3). <https://doi.org/10.5014/ajot.2025.79S302>

● WHY IS STAYING IN SCOPE IMPORTANT

OT Scope Infringement

- If the label floats free from the actions, anyone can claim our work
- Same actions as our legitimate OT intervention, but with no OT training or consumer protection
- Holding the standard protects our clients and our profession

● SECTION RECAP

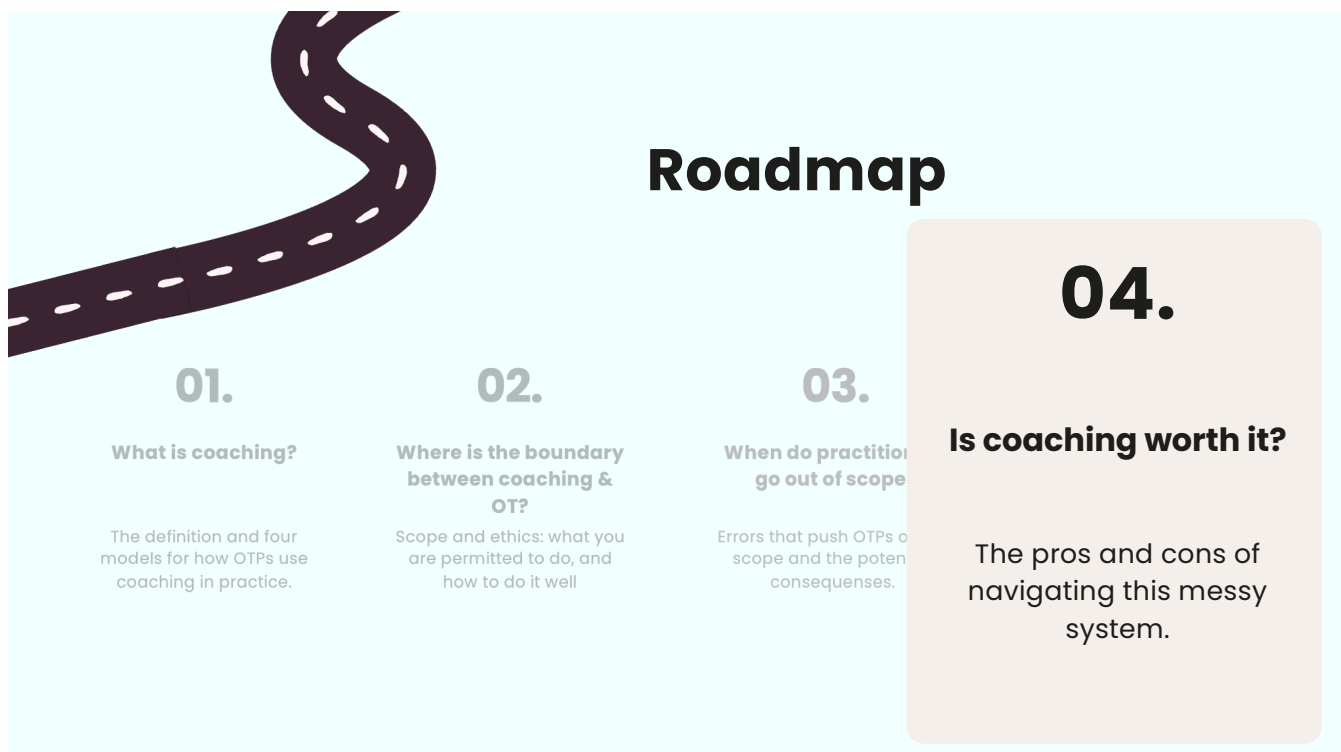
Done well versus done carelessly

Wrong Time

Done well: right time, right skill, honest name. Your expertise elevates the work.

Wrong Name

Done carelessly: wrong time, or the label drifts. The standard catches it either way.





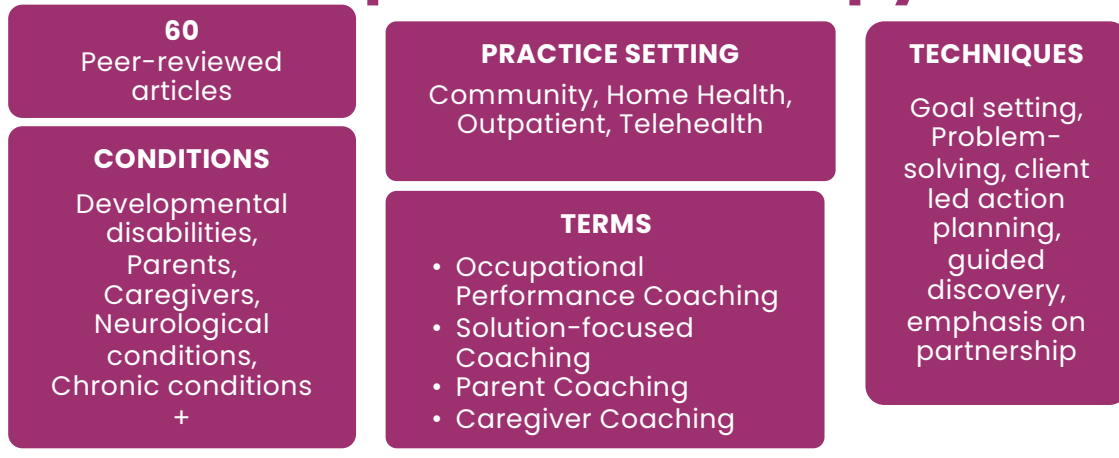
● PROS

Coaching is an Evidence Informed Intervention that Solves an Important Problem

- Many OT clients are impacted by the know-do gap
- Coaching is an important tool to improve care

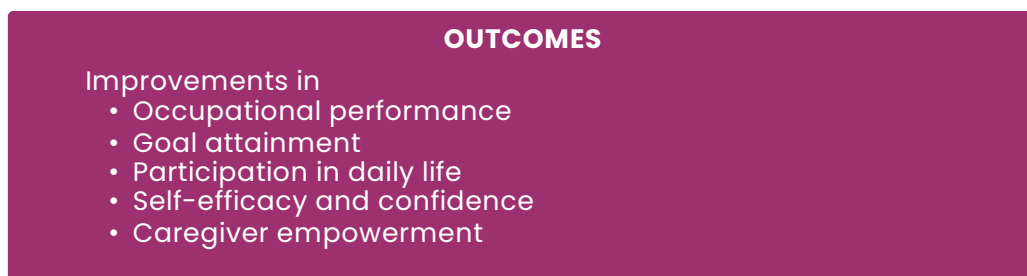
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<https://doi.org/10.1111/1440-1630.12991>

A Scoping Review of Coaching in Occupational Therapy



Graham, F., Kessler, D., Nott, M., Bernie, C., Kanagasabai, P., & Barthow, C. A. (2024). A scoping review of coaching in occupational therapy: Mapping methods, populations and outcomes. *Australian Occupational Therapy Journal*, 71(6), 1106–1130. <https://doi.org/10.1111/1440-1630.12991>

Coaching is an Evidence Informed Approach



Graham, F., Kessler, D., Nott, M., Bernie, C., Kanagasabai, P., & Barthow, C. A. (2024). A scoping review of coaching in occupational therapy: Mapping methods, populations and outcomes. *Australian Occupational Therapy Journal*, 71(6), 1106–1130. <https://doi.org/10.1111/1440-1630.12991>

“The strongest evidence of effectiveness of coaching in OT supports our use of coaching with parents of children experiencing developmental disorders, cerebral palsy and autism spectrum disorder to achieve occupational performance outcomes, improvements in motor performance, cognition and behaviour.”

Graham, F., Kessler, D., Nott, M., Bernie, C., Kanagasabai, P., & Barthow, C. A. (2024). A scoping review of coaching in occupational therapy: Mapping methods, populations and outcomes. *Australian Occupational Therapy Journal*, 71(6), 1106–1130. <https://doi.org/10.1111/1440-1630.12991>

“Evidence to support the use of coaching with adult populations suggests moderate effects on occupational performance, goal attainment and cognition, with weaker evidence to support changes in client self-efficacy”

Graham, F., Kessler, D., Nott, M., Bernie, C., Kanagasabai, P., & Barthow, C. A. (2024). A scoping review of coaching in occupational therapy: Mapping methods, populations and outcomes. *Australian Occupational Therapy Journal*, 71(6), 1106–1130. <https://doi.org/10.1111/1440-1630.12991>

● PROS

Helping people do things builds self-efficacy

- OT has always been about helping people actually do the things that matter
- Self-efficacy is the belief that you can do those things
- So this is not a detour from OT, it is the heart of what we do
- Coaching gives us a structured way to build that belief

Gage, M., & Polatajko, H. (1994). Enhancing occupational performance through an understanding of perceived self-efficacy. *The American Journal of Occupational Therapy*, 48(5), 452-461.

● PROS

Clients experience care differently

- Clients report more positive interactions than with usual care
- They value a genuine collaborative partnership
- They value goal-setting that honors their own chosen goals
- They describe building capacity and insight, not just receiving instructions

Graham, F., Kessler, D., Nott, M., Bernie, C., Kanagasabai, P., & Barthow, C. A. (2024). A scoping review of coaching in occupational therapy: Mapping methods, populations and outcomes. *Australian Occupational Therapy Journal*, 71(6), 1106-1130. <https://doi.org/10.1111/1440-1630.12991>

● **PROS**

What practitioners report

- A shift from expert to partner, with greater service effectiveness
- Enhanced client capacity, not just short-term compliance
- Greater client ownership of the work
- Many find it renews their own sense of purpose

Schwellnus, H., Seko, Y., King, G., Baldwin, P., & Servais, M. (2020). Solution-focused coaching in pediatric rehabilitation: Perceived therapist impact. *Physical & Occupational Therapy in Pediatrics*, 40(3), 263–278. <https://doi.org/10.1080/01942638.2019.1675846>

● **PROS TAKEAWAY**

The pros for coaching in OT

- A growing, credible evidence base, strongest for everyday-life goals
- Moderate effects in adults on performance, goal attainment, and cognition
- Clients feel like partners and engage more
- Practitioners report ownership, effectiveness, and renewed purpose

The cons: where it gets hard

● CONS

Implementation is genuinely hard

- Coaching needs more flexibility than many settings allow
- Client-led decision making clashes with rigid, productivity-driven workflows
- Studies consistently report these implementation challenges
- Good intentions are not enough if the system fights you

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● CONS

Role confusion

- Clients may not understand whether you are advising or coaching
- You may slip between expert and coach without noticing
- Unclear roles muddy expectations, consent, and outcomes
- Clarity about which role you are in is the antidote

● CONS

Documentation challenges

- Coaching conversations do not map neatly onto clinical documentation
- Capturing client-led, emergent work in OT notes takes skill
- A workflow problem to solve, not a reason to relabel the service

● CONS

The reimbursement reality

- Limited to no billing code for coaching
- Coaching delivered as OT is billed through existing OT codes
- Standalone coaching is typically cash-pay, which limits access
- The payment landscape pushes practitioners toward the cash-pay model

● CONS

The competence gap

- Coaching looks deceptively simple from the outside
- Done well it takes real skill in listening, goal setting, and building self-efficacy
- Quality varies widely because anyone can call themselves a coach
- Doing it well takes genuine training and practice, whatever framework you use

● **CONS**

Letting go of the expert role is hard

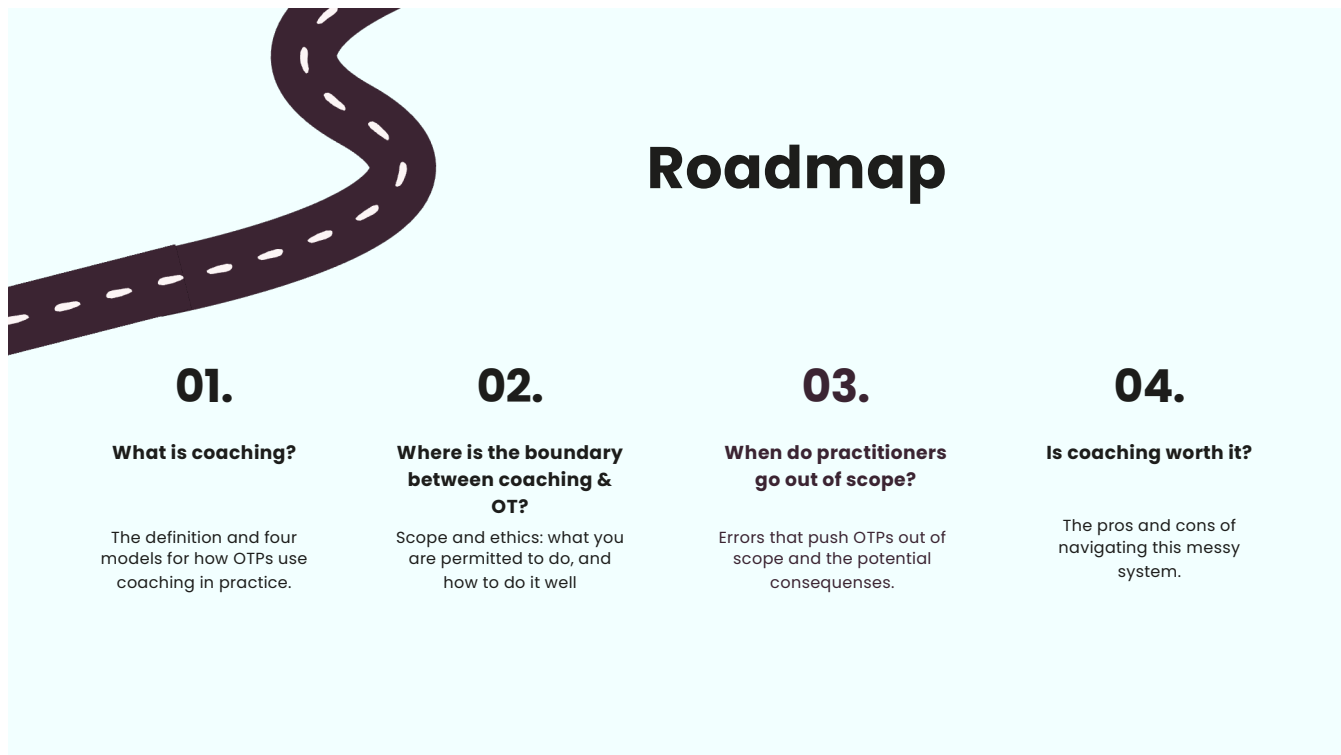
- Our training rewards us for having the answers
- Staying quiet and letting the client lead can feel deeply uncomfortable
- Without support, practitioners often default back to telling
- It is a learnable skill, but it is not automatic

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● **CONS TAKEAWAY**

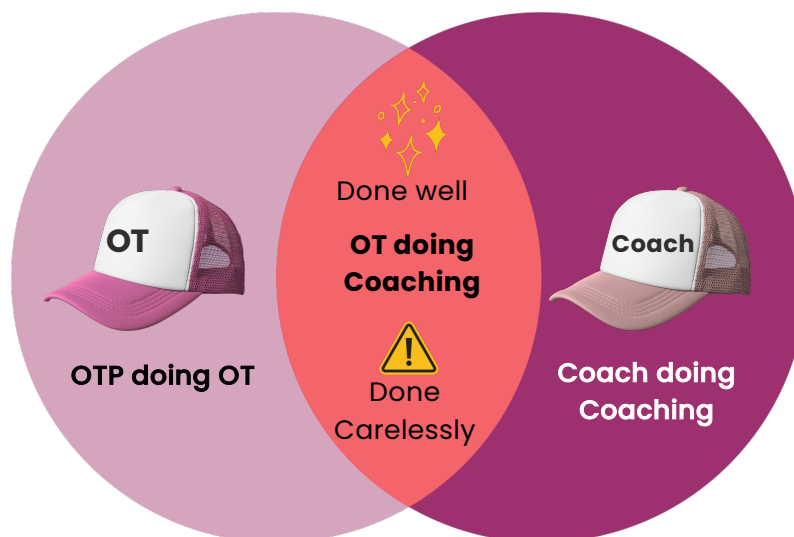
The drawbacks of coaching in OT

- Implementation, role clarity, documentation, and reimbursement are real challenges
- The competence gap means quality varies and training matters
- The done-carelessly risks we named in Section 5 are the most serious
- None of these are reasons to avoid coaching, they are reasons to do it well



● DRIVING IT HOME

Four Ways OTPs Can Integrate Coaching



● DRIVING IT HOME

Two mistakes to avoid

Wrong Time

Done well: coaching at the right time, with skill, and named honestly. Your expertise elevates the work.

Wrong Name

The standard: actions determine scope, so the label must match the work. This protects your clients and our profession.

● DRIVING IT HOME

The Case for Coaching

Coaching is an effective and life changing intervention when used at the right time and includes many logistical freedoms.

The right name right time framework gives you the skills you need to navigate this tricky system ethically with integrity.

● DRIVING IT HOME

The Case for OT

OT Practitioners have a large scope of practice. OT is effective and life changing.

The freedoms of coaching are increasingly available to OT Practitioners.

- **Credentialing is possible.**
- **OT Compact will reduce cross state burden**
- **Use of telehealth is growing**

THANK YOU



**Whatever you choose to do,
do it with confidence and
integrity**

Questions? Let's keep the conversation going.

Jaclyn Schwartz, PhD, OTR/L, FAOTA, NBC-HWC

Program Director

Just for OT: Practitioner to Coach Program

Coach@aspireot.us

@HealthCoachOT

<https://www.aspireoted.com/coach>