Clinical Documentation
I. Purpose of Documentation
   A. Safety
   B. Information
   C. Education
   D. Communication
   E. Professionalism
   F. Legal issues

II. Communication and Interviewing Skills

III. Definition of S.O.A.P.
   A. Subjective
   B. Objective
   C. Assessment
   D. Plan

IV. Subjective Data
   A. Health history
   B. Symptoms
      1. location, onset, intensity, frequency, duration
      2. aggravating activities
      3. relieving activities

V. Objective Data
   A. Palpation findings
   B. Visual observations (postural assessment)
   C. Assessment test results (ROM, etc.)
   D. Therapist treatment goals/plan/technique

VI. Assessment
   A. Changes in subjective information
      1. symptoms
      2. function
   B. Changes in objective information
      1. palpable findings
      2. other visual observations
      3. tests
      4. postural analysis

VII. Plan
   A. Homework
   B. Suggestions for next session
   C. Suggested frequency of sessions
So, you’re ready to start student clinic…

Starting Student Clinic is one of the more exciting milestones in your year at AAIMT. This is when you get to experience working in a massage therapy practice, lots of different bodies, lots of different issues in tissues. You’ve spent the past several months working on friends and family and a few professionals. Generally, working on people with whom you at least have a passing acquaintance. Now is the time to start working on the public, total strangers who are going to come to you and bring the worlds they inhabit along with them.

This on-line module will cover Student Clinic, Outreach and Clinical Documentation. So, let’s get started.

Documentation is the most important way that a massage therapist can communicate with other massage therapists, physicians, physical therapists and insurance companies. For insurance companies, and after Michigan becomes a licensure state for massage therapists, if it’s not documented it didn’t happen, so it is important that you get in the habit of documenting each session with each client. AAIMT uses SOAP notes.

S  Symptoms – what your client states about how they are feeling, what they’d like to work on that particular day

O  Observations – what you observe about your client, body reading findings, the results of any ROM testing

A  Assessment – what you felt during the massage, which muscles you worked and which techniques you used, whether or not observable changes were made to muscle tonus or posture, whether or not there were changes in the ROM after the massage

P  Plan – what homework you give the client, any plans for the next session either for you or the next therapist who sees this client, and to drink plenty of water.

For example:

S  Client complains of discomfort in the right hip a 6 on a scale of 1 to 10. Client requests deep tissue work on the right hip, but Swedish massage on the rest of his body.

O  Client’s right hip is higher than the left and has a 35 degree anterior pelvic tilt. Client is walking with a slight limp on the right side.

A  Right gluteus maximus, right gluteus minimus, right piriformis and right tensor fascia latae significantly tighter than same muscles on the left side. Used Myofascial release on right gluteus maximus, right gluteus minimus, right piriformis and right tensor fascia latae, right quadratus lumborum, right psoas and right iliacus, otherwise full body Swedish. Client states that discomfort is now a 2 on a scale of 1 to 10. Right hip is still higher than left side and anterior pelvic tilt is currently 25 degrees.
P Continue with stretching of psoas and piriformis as before. Drink plenty of water. Appointment scheduled for two weeks out. Next session Myofascial of core muscles bilaterally.

In an average massage clinic/practice there is about 15 minutes between scheduled clients to chart, change sheets, and get your room ready for the next client. Some therapists choose to do their charting at the end of the day, but it's still best to make some quick notes between clients so that they don't all run together by the end of the day. Since it would take way too much time to chart all of that long-hand, we use abbreviations to shorten it to something that looks like this…

S Client c/o discomfort in R hip, 6/10. Client req. deep tissue on R hip, but Swedish on rest of body.

O R hip is higher than L and has a 35° APT. Client walking with slight limp on R side.

A R glut max, min, piriformis and TFL significantly tighter than same on L side. Used MFR on R glut max, min, piriformis, TFL, QL, Psoas and Iliacus. Otherwise FBS. Client states that discomfort is now 2/10. R hip is still higher and APT is now 25°.

P Cont. w/ stretching of psoas and piriformis as before. Drink H₂O. Appt. scheduled in 2 wks. Next session Myofascial on core bilat.

This way is shorter, but if you don’t understand the abbreviations you can’t completely understand the note and you can’t shorten your own notes.
At the end of this module there will be a series of forms that you can download and print. Included in those forms will be a longer list of abbreviations for you to use, these are just the ones that are most common.

The abbreviations we use most commonly at AAIMT are as follows:

- **R** Right (can also be the capital R with a circle around it)
- **L** Left (can also be the capital L with a circle around it)
- **BL** Bilateral
- **@** at
- **w/** with
- **w/o** without
- **↑** Increase
- **↓** Decrease
- **Sup** superior
- **Inf** inferior
- **Ant** anterior
- **Post** posterior
- **Med** medial
- **Lat** lateral
- **Dist** distal
- **Int** internal
- **Ext** external
- **SL** side lying
- **TP** trigger point
- **c/o** complains of
- **p** after
- **X** times
- **XXF** cross fiber friction
- **MET** Muscle Energy Technique
- **PNF** Proprioceptive Neuromuscular Facilitation
- **APT** Anterior Pelvic Tilt
- **MFR** Myofascial Release
- **NMT** Neuromuscular Therapy
- **FBS** Full Body Swedish
- **ROM** Range of Motion
- **Add** adduction
- **Abd** abduction
- **WNL** within normal limits
STUDENT CLINIC

Students are eligible to work in the student clinic once they have successfully completed at least forty (40) massages in their massage log and Clinical Documentation. Students will also receive Student Clinic Orientation on their first day of Student Clinic.

Working in the Student Clinic enhances your professional, emotional, and technical development as a massage therapist. To graduate you are required to work a minimum of 115 hours in Student Clinic. The Student Clinic is designed to give you experience working in a clinical environment. Part of the experience is learning how a clinic operates, enhancing your professionalism, developing and refining skills and interacting as a massage therapist with clients.

Student Clinic Policies:

- Scheduling:

  Students are responsible for selecting the hours they would like to work in the Student Clinic. Calendars will be available one month in advance. You may only select from posted dates and times.

  Only Student Clinic Supervisors (Jimmy and Jodi) may approve and schedule your Student Clinic hours.

  Write down your requested hours on the forms provided (at the end of this module). These forms are also available in the mailboxes located at the back of the classroom in a cubby marked “Student Clinic Requests”. Include your name, and date submitted, along with the hours and dates requested and place it in the Student Clinic Supervisors’ mailbox. All requests MUST be in writing. No exceptions will be made.

  There are a maximum of five (5) positions available at any given time. Due to time sharing, more than five students may be scheduled. Please, choose from either the first or last half of the day, not the middle.

  YOU are responsible for checking to see when you have been scheduled to work in the Student Clinic and then to be there on time. Please plan to arrive at least 15 minutes before you are scheduled to start to allow yourself enough time to get your space set up.

  Only select hours you are able to work in the Student Clinic. If you need a break, please document what time you would like your break. You will not receive credit for scheduled breaks, or any requested breaks. Students who smoke will only be allowed to do so on scheduled breaks. You will be credited with your hours in Student Clinic but not the break time.

  You must select at least three (3) hours minimum and no more than six (6) hours maximum in a shift. If you are scheduled for six (6) hours; there is the potential for you to work on four or five (4 or 5) clients. Be sure to have enough sheet sets with you.
All requests for schedule changes must be in writing. There is a form available in the back of the classroom should you need to arrange to trade Student Clinic shifts with another student.

**No changes to the schedule may be made with less than a two-week notice. You must submit written notification and receive approval from the Student Clinic Supervisor, the Administrator, or School Director.**

Students are NOT allowed to schedule appointments.

While enrolled at AAIMT, students may come into the Student Clinic to receive **one free one-hour** massage per month. The scheduling procedure is as follows:

Call on the day you want your massage to see if there is time available, in other words, schedule on the same day.

If you want to book an appointment ahead for a certain time and date, you may pre-schedule, but you will then be required to pay the normal Student Clinic fee.

There are copies of the Student Clinic Request form and Student Clinic Replacement Form at the end of this module.

- **Supplies:**

  AAIMT supplies massage tables, cleaning supplies, and a music system for use in the Student Clinic. We keep music at an appropriate volume and try to match the music to the mood you would like to create during the massage.

  Students supply their own linens, bolsters, pillows, and oil. If you are in Student Clinic three (3) hours, you can do two (2) full hour or four (4) half-hour massages. Proper hygiene requires clean linens for each client. So, bring enough linens and face cradle covers for potential massages.

  Feel free to bring in a “Tip Jar” to encourage clients to offer gratuities. These can be as simple or ornate, as you desire. This also suggests to clients to pay your tip *in cash* before leaving. Please keep in mind though, that if a client does not tip you this does not indicate that you have not done a good job. Many of our clients use our Student Clinic because our fees are significantly reduced and without reduced fees they would not be able to afford to have massage.

- **Replacements:**

  Once a student’s requested hours have been approved, **it is the responsibility of the student to find a replacement** for any times they cannot work. **It is not okay to call in and leave a message that you will be unable to work your scheduled hours in the Student Clinic for any reason.** This will affect your Student Clinic grade. You will also be required to do extra hours for absences in the Student Clinic to receive a passing grade and to graduate. (One [1] absence means ten [10] additional hours in the Student Clinic.) If you find a replacement, and give the Student Clinic Supervisor advance notice you will not receive an
absence in your attendance records and ten (10) hours will not be added to your student clinic hours.

Students must notify the Student Clinic Supervisor, in writing, if there is a need to trade hours in the Student Clinic. Some clients make specific requests for student therapists and we need to know who is scheduled for a particular appointment slot. There are Replacement Forms near the Administrator Mailboxes and also attached at the end of this on-line module.

AAIMT provides a sign-up space for students who need a replacement. This Replacement List is on the Student Clinic Bulletin board. Please check these postings if you feel the need to make changes in your schedule. Alternates are kept in the schedule book.

If you have specific clients that regularly request you, this puts even more importance on advance notice of your absence in the Student Clinic. Please be a responsible professional.

Appearance:

Part of the grade given for Student Clinic participation is based upon the student’s appearance.

Students are expected to be neat and professionally attired when they are working in the Student Clinic. Acceptable professional attire includes, but is not limited to:

- Pants, slacks, saddle or stirrup pants (loose pants only) NO JEANS!
- Loose, medium length shorts (walking shorts, no higher than 4 inches above the knee)
- Loose skirts and culottes (medium length) no higher than 4” above the knee
- Long or short sleeved shirts or blouses, with or without collars including t-shirts and polo shirts. **T-shirts and polo shirts may be worn but must be plain or with massage related messages. No midriff or tank tops**
- Medical scrubs
- Mock turtleneck or turtleneck tops
- Nametags must be worn at all times
- Shoes are to be worn at all times, no open toed shoes, or flip flops

**Unacceptable attire** includes, but is not limited to:

- Jeans
- Bare midriff (no skin showing – no bra straps showing – no cleavage showing)
- Tank tops
- Warm-up suits including nylon fabric
If the dress code is ignored, the student will be asked to leave the Student Clinic and will not be credited with hours for that day and an additional 10 hours will be added to the total Student Clinic hours necessary to graduate. The student will also be counted absent for the day and will accrue an absence toward their total absences.

- **Attendance:**

  Written verification of the reason for any absence will be required.

  Start times for each day are posted on the calendar; students are expected to arrive at least **15 minutes BEFORE** their posted start time to allow ample time to get their space set up and be prepared for their first client. Arriving after the scheduled start time will be considered a tardy. A student is considered tardy up until the first scheduled treatment has begun, after that they are considered absent. These absences are reflected in the total on attendance records. Remember that a maximum of twelve (12) absences is allowed during the entire school year. You will be required to do extra hours for absences in the Student Clinic. One absence adds ten (10) hours to your Student Clinic requirements.

- **Confidentiality Issues:**

  All information given on a case history form by a Student Clinic client is the sole property of AAIMT. We take on the responsibility of liability. Therefore, any client phone number or address taken by a student will be considered a breach of client confidentiality and AAIMT will be forced to take appropriate action.

  Students are not allowed to give out their personal business cards to Student Clinic clients, or to accept client names, addresses or phone numbers. Taking clients from the Student Clinic is no different than trying to take clients from a professional clinic. It is unethical behavior.

  **Any of this type of action is grounds for dismissal.**

  AAIMT also strives to maintain confidentiality for its students. AAIMT **does not** release student names, phone numbers or addresses to clients or any other type of inquirers.

- **Greeting Clients:**

  Students are expected to greet clients at the door to the school. During the hours that the Reception Entrance is open students are expected to be waiting for their clients to arrive in the Reception area. During hours that the Reception Entrance is closed students are expected to be waiting for their clients to arrive by the Student Entrance.

  If the client is new, they will need to fill out a Health History Form.

  Please remember to introduce yourself.
Student Supervisor:

Occasionally students may be chosen to be a “Student Supervisor” in the Student Clinic when the Student Clinic Supervisor is on the phone or off the clinic floor. There will be an asterisk next to the name to designate which day has been assigned to a student. Responsibilities will be as follows:

- Make sure every client that walks through the door is properly greeted and introduced to their therapist (if the therapist hasn’t already done so). If the Student Supervisor happens to have a client and will not be available to greet other clients, make sure the Student Clinic Supervisor is aware of this and able to greet clients.
- Student Supervisor is to collect payment(s) from client(s). Other students are not to collect payments from clients unless given permission to do so by the Student Clinic Supervisor.
- Make sure there is music available and playing when Student Clinic begins.

Attitude and Conduct:

Please keep conversation to a minimum. Be respectful of others, show decorum (avoid loud, boisterous behavior), be helpful, and be positive. Students are reminded to make clients aware of the need to lower their voices. Respect those receiving massage. Students are to refrain from practicing modalities not taught at AAIMT (Reiki, Chiropractics, Esoteric Healing, Rolfing, etc.)

Hours and Fees:

Due to students being unavailable, the Student Clinic is closed during AAIMT weekend workshops for Class 23. There may be other weekends that the Student Clinic is closed as well, check the calendar for specific closings and/or extension of hours.

Payment may be made with cash, checks or charge (Visa and MasterCard). Tips may not be included in check or charge payments. Clients may write a check to the individual student for tip or leave cash.
Student Clinic Hours:

<table>
<thead>
<tr>
<th>Day</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sunday</td>
<td>10:00 a.m. – 3:00 p.m.</td>
</tr>
<tr>
<td>Monday</td>
<td>1:00 p.m. – 6:00 p.m.</td>
</tr>
<tr>
<td>Tuesday</td>
<td>1:30 p.m. – 8:30 p.m.</td>
</tr>
<tr>
<td>Wednesday</td>
<td>1:00 p.m. – 6:00 p.m.</td>
</tr>
<tr>
<td>Thursday</td>
<td>10:00 a.m. – 6:00 p.m.</td>
</tr>
<tr>
<td>Friday</td>
<td>1:30 p.m. – 8:30 p.m.</td>
</tr>
<tr>
<td>Saturday</td>
<td>11:00 a.m. – 5:00 p.m.</td>
</tr>
</tbody>
</table>

Student Clinic Fees:

<table>
<thead>
<tr>
<th>Duration</th>
<th>Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>½ Hour</td>
<td>$20.00</td>
</tr>
<tr>
<td>¾ Hour</td>
<td>$25.00</td>
</tr>
<tr>
<td>1 Hour</td>
<td>$30.00</td>
</tr>
<tr>
<td>1 ½ Hour</td>
<td>$45.00</td>
</tr>
<tr>
<td>2 Hours</td>
<td>$60.00</td>
</tr>
</tbody>
</table>

Please do not put off starting Student Clinic as this could create anxiety at the end of the year trying to get all your hours in. One day a week for 4 – 5 hours is more than sufficient to complete all of your Student Clinic hours.
COMMUNITY OUTREACH

Community Outreach takes massage therapy out of the classroom and into the community to the people who will benefit from the student’s new skills. To introduce people to massage therapy and to introduce yourself to potential clients. Unlike Student Clinic, at Outreach Events you are allowed to pass out your business cards.

Students are allowed to begin Community Outreach with successful completion of the 40 Friends and Family, 5 relaxation messages and one of the required Professional Received portions of the Massage Log as well as having completed the Clinical Documentation Online class and Review class.

All students are required to complete 55 Hours of Community Outreach and to do a minimum of 6 hours in each of the categories:

- Sports Events
- Health Awareness
- Non-Profit Agencies
- Medical Settings
- Educational Environments

The remaining 25 hours of required Outreach may be in any of the above setting that the student desires.

Students may choose what Outreaches they wish to attend from our Posted and on-going Outreaches. Students may also have the opportunity to set up their own Outreaches under certain circumstances.

Once a student has signed up for an Outreach, and their name has been stamped, they must honor this obligation. If for any reason the student will not be able to, the student must find a replacement for the event.

Students must turn in Outreach Log forms to the Academic Coordinator. They must be filled out completely, include the arrival and departure time of the student, and signed by the contact person of the event. Outreach proposal forms, Log forms, Parental Consent forms and Program Agreement forms are all located near the administrative mailboxes in the classroom.

A student may choose to complete more hours than required during this portion of the program. For furthering personal and professional growth, a student may wish to continue additional hours of externship as well as internship.

Posted Outreaches are located on the Outreach board in the classroom. The number of lines indicates the maximum number of students that may attend each individual Outreach. Once deciding on an event, write your name legibly on one of the lines. The Academic Coordinator will put a stamp over each name indicating that it has been recorded in the computer that a student has signed up to attend.
Be sure to write down the information! Please write down all the contact information, the location, date and time. It is highly recommended that if you don’t use a calendar or date book that you start to keep Outreach and Student Clinic schedules and information handy. Call the Contact Person as soon as possible to touch base. Find out what type of area you’ll be setting up in, whether or not there are any parking issues you should be aware of, see if there is water available for you and clients. Be sure to know how to get to the site before the date of the Outreach! The Academic Coordinator can get maps and directions if asked. Please keep in mind that the posted time is the time that you are expected to begin working, please allow yourself ample time to arrive, park and get your space set up.

Students are also to take some of the school’s literature with them as handouts. Student Clinic brochures, school brochures and catalogs are available from the Receptionist. There are also signs available to help make you more visible. Also, flyers entitled “Everything You Never Knew about Water” and “Stretching” may be taken to an Outreach.

Copies of the Outreach Journal/Log and Outreach Proposal Form are available at the end of this module.

It is highly recommended that you put in a minimum of 8 to 10 hours per month in Outreach to ease graduation anxiety!

- Absence Policy:

  Students are responsible for scheduling and keeping track of the hours worked at Outreach events. It is the student‘s responsibility to follow through and complete the Outreach commitment. Outreach sites are informed of who is participating in each event. Students are responsible for getting their Outreach Log forms signed by the contact person/representative at the outreach site and turned in to the Academic Coordinator.

  Students are not allowed to simply cross names off the sign-up sheet, but are to find a replacement for hours that cannot be worked. Please, notify the Academic Coordinator of any changes. Absences are recorded and a penalty of 10 additional Student Clinic hours will be added to a student’s graduation requirements should one fail to fulfill an Outreach commitment.

  When a student cannot work selected hours and cannot find a replacement, they are to call the school and report that to the Academic Coordinator. The student must speak directly to the Academic Coordinator. A last minute cancellation is unprofessional and unacceptable.

  The policy for situations in which the student does not arrived for a scheduled Community Outreach and fails to send a replacement is as follows:
For Excused Absences
• The Academic Coordinator, Administrator or Director acknowledges the need for the absence
• The absence is added to the academic/computer record

For Unexcused Absences
• “No-call” absence is unexcused
• Absence is added to academic/computer record
• 10 hours is added to required hours in Student Clinic and a Resolution is issued

Verification for the reason for any absence is required.

Students must arrive a minimum of 15 minutes before the starting time to allow for set-up. Starting times for posted Outreaches are on the sign-up sheet. Students who are tardy to an Outreach will have a tardy added to their academic/computer record, and will be assigned an additional hour of Student Clinic for each occurrence. The same consideration is mandatory for ongoing Outreaches. Not arriving on time for an event makes a strong negative statement about a student’s professionalism.

- Cancellation Policy:
  If an Outreach is cancelled by the Outreach Site for the school for any reason, the student may not count the hours and must sign up for another Outreach. No exceptions!

- Scheduling Your Own Outreach:
  We highly recommend that you begin your Outreach experience with an agency that already has an established relationship with the school. A posted Outreach or an on-going Outreach is a good place to start. Occasionally, if scheduling or traveling makes it impossible to work with the listed agencies or sites, students may establish a working relationship with an agency in their locale. Students may propose a maximum of 10 hours of Individual Outreach and must be able to justify the reason why they should be allowed to do Individual Outreach. If this becomes necessary, please speak directly with the Academic Coordinator to make alternative arrangements.

You will need to submit a completed proposal form to the Academic Coordinator prior to proceeding with an agreement to provide the agency with massage therapy. This proposal and the plan for implementation should be detailed and comprehensive. Extra proposal forms are located near the student mailboxes. The log for that Outreach is on the back side of the Proposal Form. Students must use the same form to fill out the log page. On the form please indicate the type of treatments to be provided (seated, full body tune-ups, or full body
massage); also include why this agency fits into the category of community service.

Once written approval from the Academic Coordinator has been received, the agency must sign a Community Outreach Program Agreement with AAIMT on the proposed activities. These are located near the Administration mailboxes. Please inform the Academic Coordinator in writing if dates to be worked are different from the original proposal.

Examples of Categories:

The following are just examples of the 5 Categories to give you some ideas about what would fit into each category.

• **Sporting Events (minimum of 6 hours)** (please note that chair massage does NOT qualify as Sports Massage)
  - Canoe Races
  - Bike-A-Thons
  - Fitness Expos
  - Fun Runs
  - Triathlons

• **Health Awareness (minimum of 6 hours)**
  - Women’s Health Conference
  - Employee Health Fairs
  - Career Presentations
  - Employee Appreciation Days

• **Non-Profit Agency (minimum of 6 hours)**
  - Domestic Violence Center
  - Fire, Police and EMT Departments
  - Elderly Programs
  - Volunteers Appreciation Events

• **Medical Settings (minimum of 6 hours)**
  - Hospitals
  - Medical Professionals
  - Hospice Centers

• **Educational Settings (minimum of 6 hours)**
  - Teachers Appreciation Days
  - College Programs/Events
  - Schools
  - Childcare Workers

• **Individual Sites (maximum of 10 hours)**
  Proposal Sites in student’s community which would be similar to the other 5 categories. Must be approved by Academic Coordinator.
Attire:

Students are expected to follow the guidelines in the Student Policy Handbook. Please remember that students are representing the school and the profession of massage therapy during community outreach events. Students must wear a school t-shirt and nametag as part of the appropriate attire.

In the next section are copies of the necessary forms and abbreviations.

This is a lot of information and you will have lots of questions. All of the staffs are available to answer questions, and there will be a review session on February 28, 2006 and you will have an opportunity to ask questions at that time.

The thing you need to keep foremost in your mind as you embark on this journey into practical hands-on massage therapy work is RELAX AND HAVE FUN!!!!!!!!!!!!!!!!!!!!!!! Because if you aren’t enjoying yourself that will be conveyed to your clients.