



Assessment, Treatment Planning, and Documentation for Wellness Massage

-  Topic **12-1: Assessment for a Wellness Session**
-  Topic **12-2: Palpation**
-  Topic **12-3: Session Planning for Wellness Massage**
-  Topic **12-4: Introduction to Documentation**

I. Learning Contracts

Learning contracts are an excellent way to create a personalized strategy to successfully learn new material. The learning objectives for Chapter 12 are listed here. Think about how you'll master each of these learning objectives and complete the chart with a plan for each objective. Use the example provided in Chapter 1 as a guide, but keep your own learning style and how you learn best in mind and get creative! You may be asked to create these learning contracts on your own, or your instructor may collaborate with you.

Learning Objective	Resources and Strategies	Evidence of Accomplishment	Verification of Accomplishment	Completion Date
<i>What am I going to learn?</i>	<i>What resources, strategies, and experiences will I use to learn this?</i>	<i>How will I know I have learned this?</i>	<i>How will I prove I have learned this?</i>	<i>To be added by student and instructor.</i>
12-1. Explain the concept of assessment and explain its role in a massage session.				

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12-2. Discuss the purpose of session planning and describe one method for getting the client involved in the process.				
12-3. Compare and contrast subjective and objective data.				
12-4. Provide three examples of information to include on a health intake form and explain the relevance of each.				
12-5. Summarize the information that is explained to the client as part of the informed consent process.				
12-6. Evaluate the goals of a health intake interview and defend the value of a thorough interview process.				
12-7. List the objectives of palpation assessment.				
12-8. Describe the skills a massage therapist must develop to palpate effectively.				
12-9. Compare methods for palpating muscle tissue with methods for palpating skin and superficial fascia.				
12-10. Identify the reasons why massage therapists document sessions.				

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<i>What am I going to learn?</i>	<i>What resources, strategies, and experiences will I use to learn this?</i>	<i>How will I know I have learned this?</i>	<i>How will I prove I have learned this?</i>	<i>To be added by student and instructor.</i>
12-11. Interpret the acronym SOAP.				
12-12. Give examples of the types of information that are recorded in each section of a SOAP chart.				

II. Glossary Terms

Instructions: *Please write in a brief definition of each term.*

Abbreviations _____

Assessment _____

Bony landmarks _____

Customized wellness session _____

Documentation _____

Health intake form _____

Health intake interview _____

Objective data _____

Palpation _____

Session planning _____

Standardized wellness session _____

Subjective data _____

Wellness chart _____

III. True or False?

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Instructions: *Indicate whether each of the following statements is true or false.*

1. ____ Assessment skills help therapists know when massage is contraindicated for a client.
2. ____ A health intake form should be written so that it can be used for all clients and situations.
3. ____ The client's level of sympathetic dominance should not be allowed to influence the therapist's choices of technique for the massage.
4. ____ The therapist's forearms, elbows, knuckles, and feet can be used for palpation in addition to the fingertips and palms.
5. ____ When palpating a client's tissue, therapists should generally work back from deeper layers of tissue to the superficial layers of tissue.
6. ____ If a client insists he or she wants deep work, you must proceed with deep work even if you feel that the tissue is resistant and that the client is guarding by tensing the muscles as the stroke begins.

7. ____ Documentation helps establish the boundaries of the therapeutic relationship and keep the session client-focused and treatment goal-focused.
8. ____ In documentation you should try to avoid using medical terms and medical or massage abbreviations.
9. ____ Both subjective and objective information are qualified during documentation in order to capture the nature of symptoms and signs.
10. ____ Palpation data is documented in the S section of the SOAP chart.

IV. Matching

Instructions: *Match the correct answer to its description.*

- | | |
|----------------------------|------------------------------------|
| A. Health intake form | F. Post-wellness massage interview |
| B. Today's session form | G. Subsequent wellness interviews |
| C. Informed consent form | H. S section of SOAP form |
| D. Health intake interview | I. O section of SOAP form |
| E. Physician's release | J. P section of SOAP form |

1. ____ Explains adverse reactions that can occur with massage
2. ____ May be required because of the client's condition
3. ____ Includes how you will treat the client in future sessions
4. ____ Client identifies particular areas of muscle tension currently.
5. ____ Clarifies written information to help rule out contraindications
6. ____ Includes activities of daily life that aggravate or relieve symptoms
7. ____ Includes client's personal contact information
8. ____ May give client self-care suggestions for use at home
9. ____ Includes test results
10. ____ Ask clients verbally if there have been any changes to their health.

V. Sentence Completion

Instructions: *Fill in the blanks with the correct answer.*

1. Light touch sensations are conveyed by _____ (a class of somatic receptor) called Meissner's corpuscles, Merkel's disks, and hair-root plexuses.
2. General palpation objectives include identifying _____ that are causing reductions in range of motion
3. _____ skills refer to the ability to feel nuances in tissue temperature, texture, hydration, tone, and depth.

4. The _____ fascia should glide and lift away from the muscular layer easily and evenly.
5. Session planning focuses on using data gathered _____, _____, and _____ the session to meet the client's unique wellness goals.
6. High-quality documentation is an expectation for every therapist working on a health care _____.
7. The term _____ describes how much of a sign is present or how much of the symptom the client describes.
8. If you press on an area of the client's body and the client reports that the pressure caused pain, this is considered a(n) _____ finding.
9. Objective data is based on facts and measurements rather than opinions and is often referred to as _____, while the subjective information a client reports is referred to as _____.
10. When you observe or palpate a finding, rate it in the SOAP note using a _____.

VI. Short Answer Questions

Instructions: Complete all of the following short answer questions.

Topic 12-1: Assessment for a Wellness Session

1. Make a list of problems that might occur if a therapist never used a health intake form. Try to think of at least three examples.

2. Before the massage begins, you can gather objective information about the client through observation as you interact. List things you should visually be paying attention to long before the massage begins.

Topic 12-2: Palpation

1. Explain the two reasons why you should work from superficial layers into deeper layers when palpating a client's tissues.

2. Why would a therapist want to palpate bones?

Topic 12-3: Session Planning for Wellness Massage

1. You can use data gathered before, during, and after the session for planning purposes. In the following chart, give at least one example of how you can use data gained at these three different points in time.

Before a customized wellness massage session:

During a customized wellness massage session:

After a customized wellness massage session:

Topic 12-4: Introduction to Documentation

1. List the key purposes for documenting client massage:

2. Write out the meaning of each of the following abbreviations.

Adh _____

CI _____

DOI _____

HA _____

Hx _____

LB _____

® _____

Sx _____

WNL _____

VII. Case Studies

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Topic 12-1: Assessment for a Wellness Session

You are conducting a health intake interview for a wellness session with a new client. The client’s intake form shows no preexisting or past medical conditions. The client also has written that he takes no medications. When you mention that even over-the-counter medications and many other substances taken or used could also be important, the client looks away and starts fidgeting, making you think that maybe he does take some medication or substance he doesn’t want to admit—perhaps even an illicit drug. You ask again: “Any type of medication, drug, or other substance taken could have important implications related to massage. Is there anything you have taken recently?” Again he looks nervous, pauses, and then says, “Well, not really. Nothing you need to know.” What do you say or do now?

Topic 12-2: Palpation

In the health intake interview and on the intake form, your client did not indicate any present health conditions. A few minutes into the massage, however, you note an area where her skin is reddish and feels hot on light palpation. What do you do?

Topic 12-3: Session Planning for Wellness Massage

During the intake interview for a customized wellness massage, the client said he wanted a full-body massage but with a lot of work in his shoulders because he often feels tension there. When you begin working on his shoulders, you do feel resistance and tension, but he urges you to keep going deeper. Then he asks you to skip other remaining body areas altogether and devote all the remaining time to continued deep work on his shoulders. Should you? Why or why not? How should you handle this situation?

Topic 12-4: Introduction to Documentation

Your client has had long-term lower-back pain but does not have a medical diagnosis of injury or any medical condition. Your assessment suggests her pain is related to a sedentary lifestyle and poor postural habits. You have given her some exercises to use at home between sessions that you expect to help her strengthen her back muscles and reduce the pain. Today, after completing your fifth session with her, you are confident that she is gradually improving, but she complains that massage doesn't seem to be helping at all. What do you do or say?

VIII. Activities

Topic 12-1: Assessment for a Wellness Session

Make several copies of a health intake form such as would be used for wellness massage clients. You may use the form shown in Figure 12-1 in the chapter or a form used by any massage practice.

- a. Choose three or four family members and/or friends who are *not* massage students or therapists. Ask each to fill out the form as completely and honestly as they can, as if they are just about to get a massage from the professional therapist who created this form, but tell them that *you will not be looking at the form yourself* and thus will not learn anything private about them. Tell them they can destroy the form themselves after you chat with them about this. Do not explain in detail yet why you want them to complete the form—just ask them to fill it out as they would if they were a client.
- b. Give the “client” privacy to fill out the form, asking them to come get you when they’re done. (Keep track of the time.)
- c. Let the “client” keep their form as you ask the following questions. Do not attempt to look at their form, but have a blank copy of the form to refer to yourself.
 - How long did it take you to fill out the form?
 - Was there any information you had difficulty remembering to write or check off in any section? (Do not ask about the specific information—just the section of the form.) Or any difficulty in describing your massage goals or physical condition?
 - Would you prefer to fill out a form like this in the massage practice before the massage or at home before coming to an appointment? Why?
 - Do you understand generally why you would be asked to complete a form like this before massage? If not, do you have questions now?
 - Is there anything here you feel you would resist telling a massage therapist? Would you still feel that way if the purpose of the form was fully explained to you in advance?
 - Do you have any suggestions for making this form clearer or easier to fill out?
- d. After listening to the “client’s” responses, ask them to destroy or discard the form however they like. Explain the purposes of using an intake form and say you will be designing your own before you enter practice, and their responses will be helpful. Thank them for participating.
- e. Jot down notes after talking to each “client,” but avoid reaching any conclusions yourself until you have talked with three or four different individuals.
- f. Now compare all the responses you received, looking for any areas where two or more “clients” had a similar response. Can you think of a way to revise the form that might work better for them?
- g. Finally, talk with one or more other massage students who have interviewed their own “clients.” Do they have similar ideas about how they might revise the form based on what they heard? Note that there is no one “perfect” form that everyone prefers—the goal of this exercise is to understand the thinking of people who are asked to share information on a form such as this, in order to create an effective form for your own practice.
- h. Write down what you have learned and how you might carry that into your professional life:

Topic 12-2: Palpation

Get together with a friend to practice palpation skills. Each of you should work through the following steps, taking as much time as needed, to hone your skills.

- a. Refer to an illustration in your anatomy textbook that identifies the primary skeletal muscles. Working systematically head to toe with the other student first supine and then prone, palpate each muscle to identify it by touch paired with your visual memory of its location and what it looks like.
- b. Using both hands, compare tissues symmetrically on both sides of the body. Whenever you sense any difference between muscles on the two sides, take the time to explore, so that you can identify true differences versus different sensations in your hands.
- c. Now use both hands to palpate *different* soft tissue structures on the two sides of the body at the same time, noting the differences. When comparing two different muscles, try to articulate aloud what you feel in the tissue differences, using terms you would use in documentation if this were your client.
- d. Continuing to palpate different tissues with both hands, focus on differences between muscle and other soft tissues such as tendons and ligaments. Concentrate on how these tissues feel different to your fingers. Then reverse your hands on the same tissues, to help build the palpation “memory” of both hands.
- e. Write down what you learned and what you want to remember.

Topic 12-3: Session Planning for Wellness Massage

Without looking back at your textbook, imagine you are interviewing a client who has requested a wellness massage. On a blank sheet of paper, jot down brief phrases that highlight how you will describe the different parts of your “standard” wellness massage in advance to the client.

Then write a list of questions you will ask the client to evoke responses about their preferences for how they would like the wellness massage customized.

Topic 12-4: Introduction to Documentation

For each of the following types of information related to a client and the client’s massage, identify where in a SOAP chart that information would typically be included. Write S, O, A, or P in the space for each item to label it as subjective data, objective data, assessment data, or planning data.

1. ____ Your palpation of a nodular structure on a muscle
2. ____ Client cannot sit at desk at work for long period because of her past injury
3. ____ Visual assessment that one shoulder is higher than the other
4. ____ Recommendation to client for strength-building exercise at home

5. ____ Client's description of limited range of motion in knee after car accident
6. ____ The client breathes fast and shallowly in prone position
7. ____ A client's description of a pain felt
8. ____ The techniques you applied in the session
9. ____ Statement of techniques you will use in the following session
10. ____ Client stated that a warm bath eases his muscle tightness
11. ____ Statement of goal to increase client's range of motion of upper arm
12. ____ Determination of how frequently the client will have sessions

IX. Rubrics

Learning Objective	Excellent	Good	Needs Improvement
12-1. Explain the concept of assessment and explain its role in a massage session.	The student is able to describe accurately and in detail what assessment is and why and how it is important for a massage session, giving examples.	The student can accurately describe what is included in assessment and generally why it is performed for a massage session.	The student is unable to describe what is included in assessment or its role in a massage session.
12-2. Discuss the purpose of session planning and describe one method for getting the client involved in the process.	The student is able to accurately explain the purpose of session planning and describe two or more methods for involving the client in the process.	The student can explain the general purpose of session planning and describe a method for involving the client in the process.	The student cannot explain the general purpose of session planning and/or describe a method for involving the client in the process.
12-3. Compare and contrast subjective and objective data.	The student is able to correctly define subjective and objective data and accurately compare and contrast these two types of data using examples.	The student can correctly identify subjective and objective data and compare and contrast these two types of data.	The student is unable to clearly compare and contrast subjective and objective data.
12-4. Provide three examples of information to include on a health intake form and explain the relevance of each.	The student can provide four or five examples of information included on a health intake form and accurately explain the relevance of each.	The student can provide three examples of information included on a health intake form and explain the general relevance of each.	The student is unable to provide three examples of information included on a health intake form or correctly explain their relevance.
12-5. Summarize the information that is explained to the client as part of the informed consent process.	The student can accurately and in detail state the information that is explained to the client as part of the informed consent process.	The student can accurately summarize the information that is explained to the client as part of the informed consent process.	The student cannot accurately summarize the key information that is explained to the client as part of the informed consent process.
12-6. Evaluate the goals of a health intake interview and defend the value of a thorough interview process.	The student is able to detail six or more goals of a health intake interview and explain with examples why a thorough interview process is important.	The student can describe five of the goals of a health intake interview and explain in general why a thorough interview process is important.	The student is unable to identify more than four of the goals of a health intake interview or explain the value of a thorough interview process.
12-7. List the objectives of palpation assessment.	The student is able to explain six or more objectives of palpation assessment.	The student is able to list at least five objectives of palpation assessment.	The student cannot list at least five objectives of palpation assessment.

Learning Objective	Excellent	Good	Needs Improvement
12-8. Describe the skills a massage therapist must develop to palpate effectively.	The student can accurately and in detail explain cognitive, kinesthetic, communication, and persistence skills used in palpation.	The student can generally describe the four categories of skills used in palpation.	The student is unable to list the four categories of skills used in palpation.
12-9. Compare methods for palpating muscle tissue with methods for palpating skin and superficial fascia.	The student is able to accurately and in detail describe the process for palpating muscle tissue and the process for palpating skin and superficial fascia, and compare the two.	The student can accurately describe the process for palpating muscle tissue and the process for palpating skin and superficial fascia, and the differences between them.	The student is unable to accurately differentiate between the processes for palpating muscle tissue and for palpating skin and superficial fascia.
12-10. Identify the reasons why massage therapists document sessions.	The student is able to explain accurately and in detail at least six of the purposes of documentation: promote client safety, establish the therapeutic relationship, organize assessment data, keep accurate historical records, demonstrate progress, communicate with health care team, prevent liability issues.	The student can state at least five of the seven purposes of documentation.	The student is unable to list more than four of the seven purposes of documentation.
12-11. Interpret the acronym SOAP.	The student is able to explain each of the four parts of a SOAP record: subjective data, objective data, assessment data, and planning data.	The student is able to state what each of the four letters in the acronym SOAP stands for.	The student cannot identify what each of the four letters in the acronym SOAP stands for.
12-12. Give examples of the types of information that are recorded in each section of a SOAP chart.	The student is able to give two or three examples of data recorded in each of the four parts of a SOAP chart: subjective data, objective data, assessment data, and planning data.	The student can give an example of a type of data recorded in each of the four parts of a SOAP chart.	The student is unable to give an example of a type of data for all four parts of a SOAP chart.