

Clinical Note-taking

Make better music with better notes!

Can Take Many Forms

Each employer usually will have their own forms and expectations re note-taking.

SOAP NOTES

- Maybe used formally to document your sessions
- May protect you from legal problems
- May be used to get re-imburement if you can show care was “reasonable and necessary” - the term used to validate a treatment modality
- Useful informally to organize your thinking and work
- You may want to keep these components in mind even if you don't use a strict SOAP note format

Additional uses of SOAP format

- Other health care professionals find the format / language familiar, providing an essential communication tool.
- Use of a professional reporting system enhances the image of massage as a valuable therapy.
- Charting validates massage as a curative adjunctive treatment by proving client progress.
- It is accepted by insurance companies as proof of reasonable and necessary care.
- It provides evidence for attorneys as proof of significant injury.
- It suggests a structure for potential research using case studies.

S = SUBJECTIVE

Gathered through intake form and/or interview –

- previous history
- present symptoms
- aggravating circumstances or changes in activity due to the existing symptoms
- anything client's found that relieves their symptoms
- description of onset or initial cause of the symptoms
- [if injury]: immediate post-injury activity
- all other symptoms prior to initial treatment
- necessary physical activities (job/recreation, etc.)

S - continued

- adjunctive therapies received and massage history/treatment info
 - contraindications
 - health history – diet, exercise, sleep patterns
 - pregnancies
 - emotional/physical stress (usual holding places)
 - Recent emotional trauma
 - What medications or herbs they may be taking?
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- You may want figure on which client can draw symptoms -
 - Ascertain location, intensity, duration and frequency
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- Responses to last session. Duration of relief. If pain or tension returned, what activity or event caused it to recur?

S (cont'd)

- From their answers, assess level of body awareness.
- From answers, hear or help them identify their own **health goals**.
- Encourage your clients to “own” their own healing process by changing what they do!

O - OBJECTIVE

Things you observe through sight, touch, etc.:

- Postural observations
- Movement - how they sit, look, staggered or flowing movements, uneven movements
- Proportion
- Tension
- Breathing inconsistencies

O – OBJECTIVE (cont'd)

- Compromises in ROM
- Pain in active or passive movement
- Lack of strength
- Hypertrophy or atrophy
- Hyper or hypotonicities
- Spasms
- Bruises
- Obvious symptoms (seen coughing, grimacing, etc.)

O – OBJECTIVE (cont'd)

- temperature
- abrasions
- scars
- swelling
- redness
- pallor
- skin irregularities
- varicose veins, obvious symptoms (seen coughing, grimacing, etc.)

O – OBJECTIVE (cont'd)

- Massage techniques used in order given
- Timing spent with person and their body segments

A = ASSESSMENT

- In traditional SOAP note this records and *quantifies* the extent of the changes that happened as a result of your session:
- In client's symptoms - musculo-skeletal system, function, mobility, posture, etc..
- You may re-test posture and ROM during or at end of session.
- Hypertonicities, spasms, skin temp., greater ease of breathing, etc. may have changed.

P = PLAN

Emerging Health goals and supportive actions:

- Suggestions to client re treatment frequency and focus for future sessions
- encourage specific client participation in between sessions
- Setting of short and long term goals and their role in accomplishing those goals:
- 1) Session plan(s); 2) massage frequency; 3) homework

PLAN (cont'd)

- In Plan - Take into account what worked and didn't - note specific techniques that worked well ("continue myofascial release on left semitendinosus")
- What you didn't have time to address
- What you want to make sure you work on next time
- Plan should recognize the client's individual needs and preferences - what make them feel safer, more relaxed; what they might like to begin or end a session with; techniques or table positions (side-lying) they prefer.
- Note what wasn't effective or note insights you may have had toward the end of the session that you could follow up on next time.
- Use as basis for appropriate return business.
- Re-evaluate after the agreed upon number of sessions have been completed.

PLAN (cont'd)

Homework:

- Tailored to meet personality and needs of each client, fit into their lifestyle
- Goal-oriented
- Each exercise should build on the last
- Set the client up for success
- Give One exercise at a time. May include alternative to pain pills - ice, support pillow, ergonomic furniture (don't conflict with other caregivers)
- Suggested body/breath awareness
- Short-term goals should be set weekly and monthly, and long-term goals set in 3, 6, 9 or 12 month periods.
- Homework should be given weekly according to the progress being made.

TLC Internship Expectations

- Client Intake Form

Discuss new level of expectations re note-taking with your new tools and knowledge of Deep Massage and new level of clinical reasoning you will develop

TLC Internship Expectations

- Look over “Treatment Record”

Discuss new level of expectations re note-taking with your new tools and knowledge of Deep Massage and new level of clinical reasoning you will be developing

Treatment Record (with more clinical emphasis)

- “Special Requests, concentration areas, recent illness, etc.”
 - Listen more deeply for what they say and how they say it
- “Session Plan” – based on S and O – what they say and what you observe. Do higher level planning now with new knowledge and new tools.

“Session Summary” Corresponds to O & A in SOAP note

- What did you find? – e.g. hypertonicity in gastroc., 3 ribs protruding on the left side.
- How did that deepen your understanding of them and what they needed. How did that affect assumptions in your session plan?
- What did you do? Give specifics – what muscles, what techniques, to which body parts, addressing which symptoms or issues.
- Corresponds to O & A in SOAP note
- How did they respond?
- Record changes for better (or worse...hopefully not!) as a result of session.

“Client Education”

- Corresponds to PLAN in SOAP note
- Homework – awarenesses, exercises, diet?
- Health Goals
- Recommended frequency for sessions
- Possible referral to other health professional, if appropriate

“Intern Evaluation of Session”

- With higher level of knowledge and technique record:

Your Learnings

Your Surprises - AHA's!

Your Disappointments

Your Satisfactions

Interesting Experiences