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Toolkit # 4 Getting Started



Career Prospects

(Originally appeared in *Student Business Handbook*, pages 12-13.)



Building a Clientele

(Originally appeared *Massage & Bodywork*, August/September 2000.)



Attracting Clients

(Originally appeared in *Student Business Handbook*, page 88.)



Building and Maintaining Client Loyalty

(Originally appeared in *Student Business Handbook*, page 90.)



Marketing Tips



Booking Repeat Business



Client Intake Form



Cancellation Policy



HIPAA Form



SOAP Note Form

Career Prospects



What career choices are available in massage and bodywork? The answer is simultaneously one of massage and bodywork’s greatest opportunities and challenges.

There are two primary paths to consider when evaluating career prospects in the field—work on your own, or work for someone else. A third alternative is to join or create a partnership with other professionals, an option that, while it has its own hazards, has the potential of providing many of the benefits of private practice and some of the camaraderie and shared responsibility that makes working for others attractive.

First and foremost, the career path you choose should reflect your own personal goals and interests, as well as your personal strengths and weaknesses (see “Characteristics of the Successful Practitioner,” page 8).

Going It Alone

A clear majority of bodywork professionals end up in private practice, even though not all of them start there directly out of school. One of the many attractions to the field of massage and bodywork is the ability to work independently—setting your own hours, being the boss, and putting your stamp on your work. There certainly are benefits to working independently, but

there also are challenges and responsibilities to consider as well.

Like what? Marketing, for one. When going solo, you decide who your clients will be and how to best attract them. This allows for creativity, but it also means no one else will get those clients for you. Bookkeeping is another example. When working for a chiropractor or spa, someone else will watch the money—you’ll just get paid. Not so when going solo. You get all the money, but you also get all the expense, headache, and responsibility of handling the bills.

When going it alone, there are two options to establishing a practice—creating your own or buying an existing business. Massage and bodywork are highly personal services, and there is certainly no guarantee of transferability of a client base when considering buying an existing practice or business. However, if the practice is well-established in the community, it could provide a valuable entrée that would normally take much longer to establish with a start-up business.

Working For Someone Else

Here’s a paradox of modern life: while the number of small businesses and home-based businesses in the United States has skyrocketed, the number of skilled professionals in private practice has steadily declined. In any number of skilled professions—from doctors and psychologists to plumbers and electricians—the trend has moved away from “hanging out your shingle” toward some form of employment.

Some of the causes are negative: professionals are driven out of private practice by the complexities of the business environment, the drive to keep costs down, and high levels of competition for services. But in the case of bodywork, the trend also reflects increased public interest in pursuing good health and emotional well-being.





The “mainstreaming” of massage therapy has resulted in opportunities in day spas, resorts, business hotels, gyms, and even companies looking for perks to attract top employees. Its growing legitimacy as an adjunct to conventional healthcare has opened more opportunities to work in conjunction with medical practices, chiropractors, and other health practitioners.

The benefits of employment are obvious—a degree of security, salary and benefits, regular hours, freedom from the responsibilities of running a practice, and the ability to focus all your energies on your work. This option might quickly be described as sacrificing potential revenue in order to minimize risk.

A growing number of recent massage school graduates are taking jobs in such settings as a transition step. They may work three days a week at a spa or athletic

club, then use other time to establish their own practice. Once their business reaches a critical mass, they wean themselves away from the institutional job.

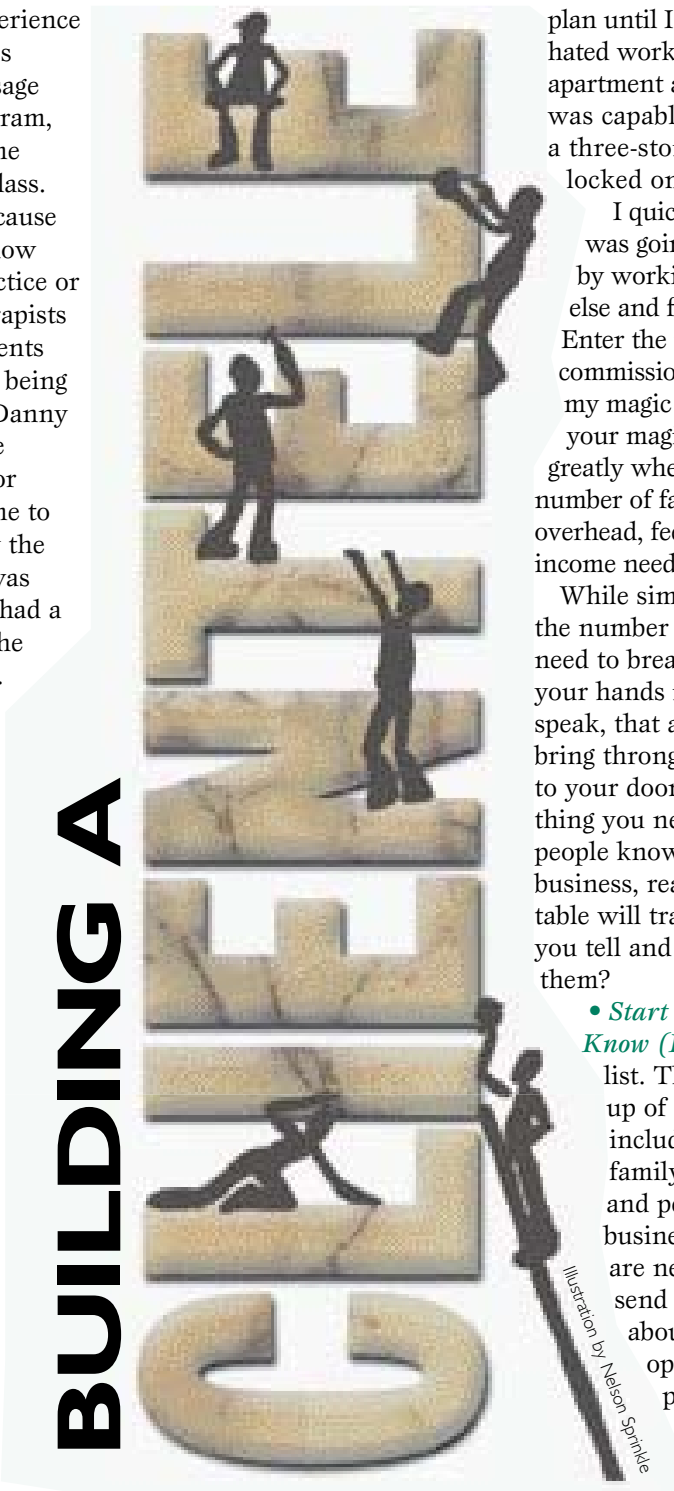
Creating A Partnership

A final option is to find a partner. Joining or creating a partnership of compatible practitioners has many benefits (see “Legal Structures of Business,” page 26). Each individual brings her talents and interests to bear on the running of the practice, and there is an opportunity to share both the financial responsibilities and management responsibilities. It also provides much of the freedom of private practice without having to shoulder the entire responsibility. But if you consider this option, choose wisely. A business partnership is much like a marriage—easy to get into, but messy to get out of. **SBH**

After my first experience teaching business classes in a massage therapy certification program, one of my students told me that he used to hate my class. “Danny” didn’t like it because instead of talking about how easy it was to build a practice or how rich all massage therapists became, I taught my students the cold, hard facts about being in this business. In fact, Danny nicknamed my class “The Reality Class.” Luckily, for both Danny and I, he came to appreciate my honesty by the end of the program and was actually thankful that he had a chance to learn some of the knowledge I had to share.

So what does the Reality Class have to do with building a clientele? One myth I have found to be prevalent with students and new therapists is that a clientele will somehow miraculously appear at the moment of graduation or the printing of business cards. Sad, but true, many business owners – not just massage therapists – have the idea that if they build it, customers will come. Though that idea worked nicely in the movie *Field of Dreams*, such is not usually the case when starting a massage therapy practice. So how can you turn your “field of dreams” into a reality? Here are a few ideas I share with my students.

Determine the magic number of clients you need to see daily, weekly or monthly to support yourself adequately. When I was planning to start my practice, my magic number was 10 clients a week. At \$50 a session in my home, 10 clients a week would create a gross income of \$500 a week with virtually no overhead. Theoretically, that figure would allow me to quit my job and live very comfortably with a lot of time off. This was a great



plan until I discovered that I hated working out of my tiny apartment and that my cat was capable of jumping from a three-story balcony when locked on the patio.

I quickly realized I was going to have to start by working somewhere else and for someone else. Enter the reality of paying commission and reworking my magic number. Obviously, your magic number can vary greatly when you consider a number of factors including overhead, fees charged and income needs.

While simply determining the number of clients you need to break even will set your hands in motion, so to speak, that alone will not bring throngs of paying clients to your doorstep. The next thing you need to do is let people know you are open for business, ready to rub, have table will travel. But who do you tell and how do you tell them?

- **Start with People You Know (PYK)** – The PYK list. This group is made up of several subgroups, including friends and family, practice clients, and people you do business with. If you are nearing graduation, send an announcement about this or the grand opening of your practice to everyone on this list. You may want to offer a special, limited time discount to

any of these folks, especially your practice clients, as a thank-you for helping you graduate. These people know you, may already be familiar with your work or your preparation for this career, and will normally be more supportive of your business at the onset than strangers would be. If you already have a practice, you may instead want to send a reminder or “Haven’t seen you in a while” mailing to encourage these folks to try you out.



START-UP WORKSHEET

20 CLIENTS A WEEK X \$50 A SESSION

20 CLIENTS A WEEK X \$50 A SESSION LESS 50% COMMISSION

\$1,000
\$500

20 CLIENTS A WEEK @ \$25 NET X 4 WEEKS =

\$2,000 month

- \$500 for taxes

*\$1,500 TAKE-HOME PAY

Minus monthly personal expenses:

Rent - \$400

Utilities/phone - \$150

Car payment - \$250

Food/personal - \$200

Misc. expenses - \$200

Savings/retirement - \$150

- \$1,350 personal expenses

CASH REMAINING = \$150

*not including business expenses

• **Network with People You Meet (PYM)** – The PYM list. Networking is basically about meeting people and exchanging information with one another in the hopes of benefiting each other and each other's businesses. There are many groups in existence designed just for networking, such as LEADS groups, but you can also network at church, social gatherings, even in line at the grocery store. The key is to always carry plenty of business cards and be prepared to talk about what you do. Remember to ask questions about them, too. Everyone likes to be asked about what they do. And be sure to keep these folks, along with your PYK list, on your business mailing list.

• **Referrals and Word-of-Mouth Advertising** – Referrals and word-of-mouth advertising are by far the most effective and inexpensive ways to build a clientele. However, before the ball can really get rolling, you will have to do some other things to get your name out there and get clients on your table. To get started, ask your current clients and your PYK list to send

you prospects. You can also ask for referrals from your PYM list and other related professionals, such as a chiropractor or counselor. Offer a special discount or incentive for each person they refer and be sure to deliver that incentive promptly with a thank-you.

• **Conventional Advertising** – Massage therapy is not the sort of business that benefits from many forms of paid advertising. Most potential clients will look for a therapist by talking to their friends, family members or other service professionals, such as hairdressers or physicians. As such, it is often hard to justify an expensive ad in a magazine, newspaper or other venue. Nonetheless, if you choose to try to attract new clients with this method, do your research and understand exactly what you are buying and how it will potentially benefit your business. Be realistic about the returns and remember that repetition is the key. You may also want to employ some outside design help if your artistic or marketing skills are not up to par.

• **Press Releases, Articles and Presentations** – This sort of advertising is usually low cost or free. Newspapers and local television shows are always looking for someone to interview or for an interesting human interest story to share with the world. Use a press release to alert the media (and hopefully the public) about your recent shiatsu certification or your successful massage work with Tripod, a three-legged Greyhound who just won his first marathon. If

you feel qualified to write an article or give a presentation, check your area for possible avenues of delivery. Exposure of your business and professional prowess through the media and public appearances will do more for your credibility than you know.

The ways in which you employ your creativity to build your practice are really limitless. You, as an individual, are really the biggest marketing piece for your business, and your personality, ambition and drive will likely set the stage for the size and type of clientele you attract. Building a clientele is not a one-stop shopping experience, but rather a career-long endeavor that takes work and persistence. Be patient and willing to try new avenues. Remember, sometimes it is the journey and not the destination that is important. **M&B**

Felicia Brown, LMT, owns a group massage therapy practice and day spa in Greensboro, N.C. Brown offers expert advice in business and marketing for massage therapists and other working professionals, and is available for lectures, workshops and private consultations. She may be reached at Balance, 823 N. Elm Street, Greensboro, NC 27401; via e-mail at FBrown6886@aol.com; or at 336/574-2556.

Attracting Clients



By Daryl Kulak

There is a lot of pressure on you when you feel like you have to go searching for clients and drag them in by the scruffs of their necks.

Release that pressure! Your job is not to find clients. Your job is to attract clients. In this article, we'll discuss the specifics about how you can do that and why it's easier and more effective than coercing clients.

Sales and marketing in the twenty-first century has evolved. Buyers don't want to be sold something. They just want to buy. That means that any type of high-pressure sales technique like "Get them to book that appointment before they leave your office" will fall flat or backfire.

So, instead of putting effort into finding clients, we endeavor to attract them. Is attracting a passive pursuit? Not at all. It's very active, but in a different way than finding.

Stay Focused

Your business identity must remain constant and true to its focus. By business identity, I mean a) who you are serving and b) the problem you're solving for them.

Here are some examples of whom you might serve:

- Lawyers.
- Office workers.
- People with artificial limbs.
- Seniors.
- Skydivers.
- Stay-at-home moms.

Here are some examples of the problem you might be solving for that particular group:

- Arthritis.
- Communicating to kids of a divorce.
- Diabetes.
- Fibromyalgia.
- Increasing immunity.
- Losing weight.
- Neck pain.
- Relieving worry.
- Succeeding in school.
- Wrist pain.

The best way to pick something that you'll be able to keep focused on for a long time is to choose something you're passionate about. Do you love being around seniors? Do you

see obesity as a national crisis and you want to be part of the solution?

The main thing is: don't shift around in your focus. If you can stick with one particular target market and solving one particular problem for them, you will eventually succeed, even if that market is quite small. A tight focus is always better than a broad statement that "I help everybody with everything," which is so common in holistic health marketing.

Be Seen

Molly Gordon, author of *Authentic Promotion*, says we need to become aware of a business at least twenty times before we will actually buy from them. That means you need to get your message out there and often. How do we do that? With a bunch of advertisements in the local paper? No! (See "Creating a Marketing Plan," page 84). You speak in front of groups. You write for local newsletters and create your own e-mail newsletter. You join the support groups that are dedicated to solving the same problem your business solves.

In the great marketing book *Attracting Perfect Clients*, Stacey Hall and Jan Brogniez say your business needs to be like a lighthouse, shining its clear focused





light out to the boats (clients) in the bay, showing them the way. The lighthouse doesn't wade out into the bay and pull the boats in. It doesn't try to catch their attention by running up and down the shore. In fact, both tactics would confuse the boats more than help them.

By maintaining your focus and being seen, you'll be like a lighthouse attracting the right kind of clients and being there when your clients need you.

Be Seen As An Expert

Okay, now that you're out there, how do your potential clients perceive you? Hopefully they think of you as an excellent resource for the problem you deal with. But you say you're not that much of an "expert" just yet? That's okay. Today is a great day to get started on that.

Do your homework. Use the Internet and your local library to research this particular problem area. Oh, there's no book or website on relieving worry for seniors? That's great news. You'll be the first to write the book or create the website.

The best way to begin your research into the problem area is to interview people in your target market who have the problem you want to solve. What are the specifics of the problem for that person? What has she tried? What worked? What didn't? What things is she open to? What wouldn't she consider?

Conduct at least twenty interviews. This will provide you with a rich source of ideas for your business. Give her some gift at the end of the process. You could write a short report about what you found during all these interviews and provide the report back to everyone who participated. Or you could give them all a free session of your newly created service.



What about those businesses that don't have a clear focus or that don't solve a particular problem for a target market? How do they do marketing? There are certainly businesses that have succeeded over the years without having a focus. But our estimate is that it takes perhaps quadruple the effort in marketing to make the unfocused business succeed versus the focused business. It just means more work, more speaking, more writing, more networking. Same ingredients, just more of them. **SBH**

Daryl Kulak is president of the Simplicity Institute, a business school for the holistic healthcare community (www.simplicity-institute.com).

Building and Maintaining Client Loyalty



One of the worst sins in any business is taking a client for granted—especially a steady, loyal client. Yet often those are exactly the individuals we stop thinking about, instead concentrating our energies on recruiting new clients and converting the first-timer into a regular customer.

Adding variety to the experience you provide is important (see “The Spice of Life,” page 91), but not as important as sharpening your ability to pay attention to each client’s needs in a given session. Ordinary listening doesn’t cut it. You need truly empathic listening skills. Jim Herweg, former director at the Kalamazoo Center for the Healing Arts, explained it this way:

“In our zealotry to be perceived as healthcare providers, we fail to realize that many clients are focused somewhere else entirely. In the intensive care unit of the heart are carefully stored the pains and disappointments, the longings and loves that motivate our

behavior. When it comes to sharing these with others, visiting hours are rare.

“Perhaps the biggest single mistake we can make is to think we know where a session is going. At that instant, we stop working with clients and begin working on them. Regardless of skill, these sessions go ‘thunk.’

“The deeper the connection we make with our clients, the more profoundly our touch will impact their lives. Don’t try to fix anybody. Don’t give advice unless you have a license to do so. Do be immensely human. For that, we are all fully qualified.

“If you can discover why a client really came in, you can demonstrate how bodywork adds value to that aspect of her life. This is healthcare and marketing at the core. It’s very powerful stuff, because it welds the love you put into your work with the values that are driving your client’s life. And it beats the pants off an ad in the paper.” **SBH**



How To Cultivate Adoration

SalesDoctors Magazine lists five steps to getting customers to “adore you”:

- Establish common ground.
- Keep a positive attitude.
- Listen and show concern.
- Treat customers like family.
- Use humor



The Spice Of Life

You know the old saying, “Variety is the spice of life.” Following are some tips for keeping your services fresh, especially for those longtime clients:

- Create a website and update the content from time to time. Links to ABMP’s public education website, www.massagetherapy.com, are easy ways to keep content fresh without having to reinvent the wheel. For more information on creating your own website, see page 103, or visit the Web Community on www.abmp.com.
- Compose and send out a quarterly newsletter. As a member benefit, ABMP has created a program in which you can customize and generate your own newsletter. To learn more, see page 100, or visit www.abmp.com.
- Create a type of frequent flyer punch card for your clients: buy ten massages, get one free.
- Establish a referral program: refer a friend, get \$10 off your next massage.
- Send handwritten notes to clients to thank them for recent appointments or referrals or just to wish them a nice day.
- Use the techniques you have, and learn a few new ones every year.
- Within the boundaries of sound practice, vary your order of working on different muscle groups.
- Experiment with different background music.
- Add seasonal items to the products you sell, such as suntan lotion or fresh organic tomatoes.
- Purchase copies of ABMP’s best client education tool, *Body Sense* magazine, to help your customers understand the whys and wherefores of bodywork.
- Surprise your MVP clients with a small gift or coupon, a token of your appreciation for their patronage.

Client Information

Name _____ Phone (_____) _____ DOB _____

Address _____ City _____ State _____ Zip _____

E-mail: _____

Referred by: _____ Phone (_____) _____

In case of emergency: _____ Phone (_____) _____

Occupation _____ Male Female Physician _____

Health Insurance Carrier _____

Please take a moment to carefully read the following information and sign where indicated. If you have a specific medical condition or specific symptoms, massage/bodywork may be contraindicated. A referral from your primary care provider may be required prior to service being provided.

Have you ever experienced a professional massage or bodywork session? Yes No How recently? _____

What are your massage or bodywork goals? _____

What kind of pressure do you prefer? light medium firm

If you answer "yes" to any of the following questions, please explain as clearly as possible.

- | | |
|---|---|
| <input type="checkbox"/> Yes <input type="checkbox"/> No Do you frequently suffer from stress? | <input type="checkbox"/> Yes <input type="checkbox"/> No Do you bruise easily? |
| <input type="checkbox"/> Yes <input type="checkbox"/> No Do you have diabetes? | <input type="checkbox"/> Yes <input type="checkbox"/> No Any broken bones in the past two years? |
| <input type="checkbox"/> Yes <input type="checkbox"/> No Do you experience frequent headaches? | <input type="checkbox"/> Yes <input type="checkbox"/> No Any injuries in the past two years? |
| <input type="checkbox"/> Yes <input type="checkbox"/> No Are you pregnant? | <input type="checkbox"/> Yes <input type="checkbox"/> No Do you have tension or soreness in a specific area?
Please specify _____ |
| <input type="checkbox"/> Yes <input type="checkbox"/> No Do you suffer from arthritis? | |
| <input type="checkbox"/> Yes <input type="checkbox"/> No Are you wearing contact lenses? | |
| <input type="checkbox"/> Yes <input type="checkbox"/> No Are you wearing dentures? | <input type="checkbox"/> Yes <input type="checkbox"/> No Do you have cardiac or circulatory problems? |
| <input type="checkbox"/> Yes <input type="checkbox"/> No Do you have high blood pressure? | <input type="checkbox"/> Yes <input type="checkbox"/> No Do you suffer from back pain? |
| <input type="checkbox"/> Yes <input type="checkbox"/> No Are you taking high blood pressure medication? | <input type="checkbox"/> Yes <input type="checkbox"/> No Do you have numbness or stabbing pains? |
| <input type="checkbox"/> Yes <input type="checkbox"/> No Do you suffer from epilepsy or seizures? | <input type="checkbox"/> Yes <input type="checkbox"/> No Are you sensitive to touch or pressure in any area? |
| <input type="checkbox"/> Yes <input type="checkbox"/> No Do you suffer from joint swelling? | <input type="checkbox"/> Yes <input type="checkbox"/> No Have you ever had surgery? Explain below. |
| <input type="checkbox"/> Yes <input type="checkbox"/> No Do you have varicose veins? | <input type="checkbox"/> Yes <input type="checkbox"/> No Other medical condition, or are you taking any
medications I should know about? |
| <input type="checkbox"/> Yes <input type="checkbox"/> No Do you have any contagious diseases? | |
| <input type="checkbox"/> Yes <input type="checkbox"/> No Do you have osteoporosis? | Comments _____ |
| <input type="checkbox"/> Yes <input type="checkbox"/> No Do you have any allergies? | _____ |

I understand that the massage/bodywork I receive is provided for the basic purpose of relaxation and relief of muscular tension. If I experience any pain or discomfort during this session, I will immediately inform the practitioner so that the pressure and/or strokes may be adjusted to my level of comfort. I further understand that massage or bodywork should not be construed as a substitute for medical examination, diagnosis, or treatment and that I should see a physician, chiropractor, or other qualified medical specialist for any mental or physical ailment of which I am aware. I understand that massage/bodywork practitioners are not qualified to perform spinal or skeletal adjustments, diagnose, prescribe, or treat any physical or mental illness, and that nothing said in the course of the session given should be construed as such. Because massage/ bodywork should not be performed under certain medical conditions, I affirm that I have stated all my known medical conditions and answered all questions honestly. I agree to keep the practitioner updated as to any changes in my medical profile and understand that there shall be no liability on the practitioner's part should I fail to do so. I also understand that any illicit or sexually suggestive remarks or advances made by me will result in immediate termination of the session, and I will be liable for payment of the scheduled appointment.

Client Signature _____ Date _____

Practitioner Signature _____ Date _____

Consent to Treatment of Minor: By my signature below, I hereby authorize _____ to administer massage, bodywork, or somatic therapy techniques to my child or dependent as they deem necessary.

Signature of Parent or Guardian _____ Date _____

We understand that unanticipated events happen occasionally in everyone's life. Business meetings, project deadlines, flight delays, car problems, snowstorms, and illness are just a few reasons why one might consider canceling an appointment. In our desire to be effective and fair to all of our clients and out of consideration for our therapists' time, we have adopted the following policies:

- **24 hour advance notice is required** when cancelling an appointment. This allows the opportunity for someone else to schedule an appointment.
- If you are unable to give us 24 hours advance notice you will be charged the **full amount** of your appointment. This amount must be paid prior to your next scheduled appointment.

No-shows

Anyone who either forgets or consciously chooses to forgo their appointment for whatever reason will be considered a "no-show". They will be charged for their "missed" appointment and future service will be denied until payment is made.

Arriving late

Appointment times have been arranged specifically for you. If you arrive late your session may be shortened in order to accommodate others whose appointments follow yours. Depending upon how late you arrive, your therapist will then determine if there is enough time remaining to start a treatment. Regardless of the length of the treatment actually given, **you will be responsible for the "full" session.**

*Out of respect and consideration to your therapist and other customers, **please plan accordingly and be on time.***

WE LOOK FORWARD TO SERVING YOU.

NOTICE OF PRIVACY PRACTICES FOR PROTECTED HEALTH INFORMATION

Law requires the privacy of your health information be maintained and that you are provided this notice of the legal duties and privacy practices with respect to your health information. Other than the uses and disclosures we described below, your health information will not be sold or provided to any outside marketing organization.

We must abide by the terms of this notice and we reserve the right to change the terms of this privacy notice. If a change is made, it will apply for all of your health information in our files, and you will be notified in writing.

HOW INFORMATION ABOUT YOU MAY BE USED AND DISCLOSED AND HOW YOU CAN GET ACCESS TO THIS INFORMATION.

USES AND DISCLOSURES

Here are examples of use and disclosure of your health care information:

1. We may have to disclose your health information to another health care provider, or a hospital, etc., if it is necessary to refer you to them for the diagnosis, assessment, or treatment of your health condition.
2. We may have to disclose your session records and your billing records to another party (i.e. your insurance company), if they are potentially responsible for the payment of your services.
3. We may need to use any information in your file for quality control purposes or any other administrative purposes to run this practice.
4. We may need to use your name, address, phone number, and your records to contact you to provide appointment reminder calls, recall postcards, Welcome and Thank You cards, information about alternative therapies, or other related information that may be of interest to you. If you are not at home to receive an appointment reminder, a message will be left on your answering machine.

YOUR RIGHT TO LIMIT USES OR DISCLOSURES

You have the right to request that we do not disclose your information to specific individuals, companies, or organizations. Any restrictions should be requested in writing. We are not required to honor these requests. If we agree with your restrictions, the restriction is binding on us.

PERMITTED USES AND DISCLOSURES WITHOUT YOUR CONSENT OR AUTHORIZATION

Under federal law, we are also permitted or required to use or disclose your information without your consent or authorization in the following circumstances:

1. We are providing services to you based on the orders (referral) of a health care provider.
2. We provide services to you in an emergency and are unable to obtain your consent after attempting to do so.
3. If there are substantial barriers to communicating with you, but in our professional judgment we believe that you intend for us to provide care.

REVOKING YOUR AUTHORIZATION

You may revoke your authorization to us at any time in writing. There are two circumstances under which we will not be able to honor your revocation request:

1. If your information has been released prior to your request to revoke your authorization. 165.508(b)(5)(I)
2. If you were required to give your authorization as a condition of obtaining insurance, the insurance company may have a right to your information if they decide to contest any of your claims.

CONFIDENTIAL COMMUNICATION

We will attempt to accommodate any reasonable written request regarding your contact information that has been provided by you.

AMENDING YOUR HEALTH INFORMATION

You have the right to request that we amend your health information for seven years from the date that the record was created or as long as the information remains in our files. We require a written request to amend your records that includes a valid reason to support the change. We have the right to refuse your request.

INSPECTING/COPYING YOUR HEALTH INFORMATION

You have the right to inspect the your files while in our office and/or have a copy made for you. The information is available up to seven years from the date that the record was created. Your request to inspect or obtain a copy of the file must be in writing. There will be a charge of \$.20 per page copied.

ACCOUNTING OF DISCLOSURES OF YOUR RECORDS

You have the right to request an accounting of any disclosures (not listed below) made of your information for six years prior to the date of your request. The request must be in writing. The accounting will exclude the following disclosures:

- Required for your session, to obtain payment for services, to run our practice, and/or made to you.
- Necessary to maintain a directory of the individuals in our facility or to individuals involved in your care.
- For national security, intelligence purposes, or law enforcement officers.
- That were made prior to the effective date of the HIPAA privacy law (April 14, 2003).

We will provide the first accounting within a 12-month period without any charge, but any additional requests will be charged a fee. When you make your request we will tell you the amount of the fee and you will have the opportunity to withdraw or modify your request

RE-DISCLOSURE

We cannot control the actions of others to whom we have released your information for further treatment. Information that we use or disclose may be subject to re-disclosure by these individuals/facilities and may no longer be protected by the federal privacy rules.

COMPLAINTS

You may complain to us or to the Secretary for Health and Human Services if you feel that we have violated your privacy rights. We respect your right to file a complaint and will not take any action against you if you file a complaint. Written comments should be addressed to our office address or Secretary for Health and Human Services, 200 Independence Ave. SW, Room 509F, HHH Bldg. Washington, DC 20201.

This notice effective as of April 14, 2003. This notice will expire six years after the date upon which the record was created. By signing below, I acknowledge that I was given the opportunity to read and ask questions.

I, _____, give my permission for you to leave any information for me and use your name/clinic name at the following:

Home phone _____

Work phone _____

Cell phone _____

Fax _____

Client Name Printed

Date

Client Signature

Authorized Staff Person

Personal Representative Printed

Personal Representative Signature

Description of personal representative's authority to act for the client.

SOAP Notes



Client _____

- S** (Subjective) Information on client symptoms given by either the client or the referring healthcare provider.
- O** (Objective) Derived from a client interview, health history, visual exam, range-of-motion testing, posture assessment, or palpatory results.
- A** (Assessment/Application) What kinds of treatment were used? What changes took place as a result of the treatment?
- P** (Plan Of Treatment/Progress) Under the auspices of medical massage, this category would include the treatment options given you by the referring physician.

Date of Session _____ Time of Session _____ Length of Session _____

S _____
O _____
A _____
P _____

Date of Session _____ Time of Session _____ Length of Session _____

S _____
O _____
A _____
P _____

Date of Session _____ Time of Session _____ Length of Session _____

S _____
O _____
A _____
P _____

Symbols Key:
Pain = ● Left = L Right = R Inflammation = ① Increased, elevated = ↑
Decreased, depressed = ↓ Greater release = ☆ Cross-fiber friction = XFF Range of Motion = ROM