

Ethics in Massage - Roles and Boundaries Home Study Course

2 CE Credit Hours
Text and Online Study Guide

Presented by the:
Center for Massage Therapy Continuing Education

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It is the responsibility of the practitioner to determine the appropriateness of the principles presented in terms within the scope of practice. This information is in no way meant to diagnose or treat medical conditions.

Instructions for the Ethics in Massage – Roles and Boundaries Home Study Course

Thank you for investing in the Ethics in Massage home study e-course, a 2 CE credit hour course designed to further your knowledge in the principles and practices of professional ethics. The following will give instructions on what you will need to do to complete this course. This is a 2 CE hour course, so that means it should take you approximately 2 hours to read the text, login and complete the examination.

This course includes the NCBTMB's 2 CE hour Standard V requirement.

The following are steps to follow in completing this course:

- 1. Read the instructions and review the text and exam.**
- 2. Access the online examination in your account at www.massagetherapyceu.com.**
- 3. Complete your examination and print your certificate. The exam is open book and there is no time limit for completion.**

You must pass the exam with an 80% or better to pass this home study course. You are allowed to access and take the exam up to 3 times if needed. There is no time limit when taking the exam. Feel free to review the text while taking the exam. There are no trick questions on the exam. All of the answers are clearly found in the text. The exam is also included at the end of the text for review before taking the exam.

It is advised to answer the exam questions in the study guide before testing online. That way, when you are testing you do not have go back and forth through the online exam and risk losing your answered questions!

Good luck as you complete this course. If you have any questions please feel free to contact us at 866-784-5940, 712-490-8245 or info@massagetherapyceu.com. Most state boards require that you keep your "certificate of achievement" for at least four years in case of audit. Thank you for taking our Ethics in Massage – Roles and Boundaries home study course.

Ethics in Massage – Roles and Boundaries Text

INTRODUCTION

The periodic review of ethics is necessary in the massage therapy field in order to maintain the standards of practice and code of ethics set forth by your state agency and the National Certification Board of Therapeutic Massage and Bodywork. Many states have adopted the National Certification Board for Therapeutic Massage and Bodywork's code of ethics and standards of practice. However, some individual states may have variations of these according to their own law of practice. This course is designed and written around the **National Certification Board for Therapeutic Massage and Bodywork's** (NCBTMB) code of ethics and standards of practice.

It is important to first define the governing board that this course is modeled after. The National Certification Board for Therapeutic Massage and Bodywork is an independent board that evaluates a massage professional's education and experience and determines if the potential certificant meets the Board's standards. The Board does certification for the entire United States regardless of the particular states regulations. Potential certificants must also pass a certification examination and keep current with continuing education.

This course will outline the scope of practice for the massage therapy profession. It will also explain professionalism, confidentiality, roles, boundaries, proper sexual conduct, common contraindications, draping, record keeping, when to refer a client to the proper medical professional and the concept of "Do No Harm." If at any time, through the course of your work you need assistance, please contact the Center for Massage Therapy Continuing Education at 866-784-5940 or via email at info@massagetherapyceu.com and someone will promptly assist you. We are here to serve you and answer any questions you may have. This course is revised often and every effort is made to ensure the accuracy of the content. Should you have any concerns please contact us at the above listed sources.

DO NO HARM

The concept of the "**Do No Harm**" principle applies not only to the client, but also to the therapist. Ethics in massage therapy and the medical profession is based upon the "Do No Harm" theory. The American Massage Therapy Association states in its code of ethics that massage therapists shall:

"Accept responsibility to do no harm to the physical, mental
and emotional well-being of self, clients, and associates."

A massage therapist must act in a way that is in the best interest of themselves and the public, which includes treating all clients equally and following all state and local laws. The concept "Do No Harm" is also mentioned by the National Certification Board for Therapeutic Massage and Bodywork. In addition to this, the principle is associated with the fundamental teaching of the Hippocratic Oath, which is taught in massage schools and other medical professions around the country. The Hippocratic Oath has been a prevailing factor in medicine for over 2000 years. If you are ever in doubt on an ethical issue, a vital element to keep in mind is to DO NO HARM.

The term **ethics** can be defined as a system or set of moral rules, principles or ideas that govern behavior. In massage therapy, morals preside over every relationship we have including relationships with clients, associates, other health care professionals and the general public. The ethical guidelines set forth in the massage therapy profession are values and ideals for making proper decisions in the best interest of every party included. These guidelines are formulated mainly by the National Certification Board for Therapeutic Massage and Bodywork and upheld by state and local regulations. The governing boards in massage therapy write their code of ethics and standards of practice according to what they believe to be essential to the integrity of the profession. Every professional organization's code of ethics has key issues that are equally

important and relevant. It is not always necessary to memorize each professional organization's standards of practice, but it is imperative to conduct your self in a way that is professional, courteous and responsible.

SCOPE OF PRACTICE

Before getting into the specifics of a massage therapist's standards of practice and code of ethics we must first define **scope of practice**. What is a scope of practice? The scope of practice is the range of behavior that is permissible in a legally licensed profession. Each state may have a different definition of the scope of practice for massage therapists. You will need to know the definition of massage therapy in your own state in order to legally practice. The definition of massage therapy may vary greatly for each governing board.

The Florida Board of Massage Therapy located in *Florida Department of health laws and rules chapter 480 and Florida Statutes and Rule Chapter 64B7* states that massage is:

“The manipulation of the soft tissues of the human body with the hand, foot, arm, or elbow, whether or not such manipulation is aided by hydrotherapy, including colonic irrigation, or thermal therapy; any electrical or mechanical device; or the application to the human body of a chemical or herbal preparation.”

Varying states define and exclude activities a massage therapist can legally do in each state. There are also many states that do not govern and license the massage therapy profession. In those states, there are some general rules you can follow to keep and uphold an ethical, professional massage therapy practice. They are as follows:

- ◆ Follow the NCBTMB code of ethics and standards of practice
- ◆ Do not prescribe
- ◆ Do not diagnose
- ◆ Do not manipulate osseous tissue
- ◆ Have the proper education – a minimum 250-500 hours is most common, but that is continually changing
- ◆ May use heat, cold, oil or lotion
- ◆ Adhere to any state and local laws regarding business practices

Your education, training and professional associations should be freely displayed and accessible to the public. State law and professional organizations consider misrepresentation of your education, scope of practice or license grounds for revocation, unacceptable and also unethical. Please be acquainted with your own states definitions and scope of practice for massage therapy.

PROFESSIONALISM

When we hear the word “**professional**” what comes to mind? In a massage therapy this word can be alleged as a practitioner who is distant and unfriendly. When in fact, there is nothing further from the truth. Being professional simply means that we pay attention to our client's needs. It also means that we dress and act in a manner that is neat, clean and polite. Being professional is another way of being kind to clients.

Defining professionalism in massage therapy is a combination of many factors. According to the National Certification Board for Therapeutic Massage and Bodywork http://www.ncbtmb.com/standards_of_practice.htm, *Standard I*, professionalism includes:

- ◆ Adhering to the code of ethics and standards of practice set forth by the board
- ◆ conducting themselves in a manner in all settings meriting the respect of the public and other professionals
- ◆ treating each client with respect, dignity and worth
- ◆ using professional verbal, nonverbal and written communications
- ◆ providing an environment that is safe and comfortable for the client and which, at a minimum, meets all legal requirements for health and safety

- ◆ Insuring the client hygienic practices and maintaining a level of personal hygiene appropriate to practitioners in a massage therapy setting
- ◆ Wearing clothing that is neat, clean and modest
- ◆ obtaining voluntary and informed consent from the client prior to initiating the session either in writing or verbally
- ◆ using appropriate draping to protect the client's physical and emotional privacy
- ◆ being knowledgeable of their scope of practice and practice only within these limitations
- ◆ referring to other professionals when in the best interest of the client and/or practitioner
- ◆ Respecting actions of peers, associates, colleagues and clients

When considering professionalism it is imperative to demonstrate an appropriate demeanor and show respect for peers, clients, associates and the general public. You as a therapist must respect the race, creed and sexual orientation of each and every client. Professionalism applies to every aspect of your practice everyday. The American Massage Therapy Association also states in their code of ethics that:

“Professionalism includes acknowledging the inherent worth and individuality of each person by not discriminating or behaving in any prejudicial manner with clients and/or colleagues.”

Professionalism is also about setting proper **boundaries** and roles in our relationships. Boundaries can be defined as the way we define our relationships as professional. Proper boundaries safeguard the therapeutic value of professional relationships. Boundaries will be discussed in further detail according to the National Certification Board for Therapeutic Massage and Bodywork standards of practice later in this text.

CONFIDENTIALITY

Another facet of professionalism and ethics is **confidentiality**. Confidentiality is defined at www.dictionary.com as:

“The ethical principle or legal right that a physician or other health professional will hold secret all information relating to a patient, unless the patient gives consent permitting disclosure.”

Confidentiality applies to verbal and written information related to you by the client/patient. Is there ever an exception to this rule? The answer is yes, there are three key situations when you may be required to break a client's confidentiality according to <http://psychcentral.org/best/best2.htm>. They are as follows:

- ◆ In the event of a court order you may be required to divulge information according to the law
- ◆ In a life or death situation: when the client's life is in danger, or the client threatens to harm someone else, the client's rights to confidentiality are forfeited. Life is more important than a person's right to privacy.
- ◆ In the event of abuse: our law tolerates no form of abuse whether it is child, elderly or any other kind. Therapists may have to break confidentiality either to protect the client or to protect the victim.

The National Certification Board for Therapeutic Massage and Bodywork and the American Massage Therapy Association agree that there are situations when you may be required to break confidentiality. As massage therapists, it is rare that you will encounter any one of these situations; but if you do it is your legal and ethical duty to report information to the proper authorities. It may save a life.

Aside from the three exceptions all other interactions between the client and therapist are required to be kept confidential. As stated in the *NCBTMB Standard III*, massage therapists must:

- ◆ Protect the client's identity in social conversations, all advertisements, and any and all other manners unless requested by the client in writing, medically necessary, or required by law
- ◆ Protect the interests of clients who are minors or who are unable to give voluntary consent by securing permission from an appropriate third party or guardian

- ◆ Solicit only information that is relevant to the professional client/therapist relationship
- ◆ Maintain the client files for a minimum period of four years and store and dispose of client files in a secure manner

Your own state may have a set of laws that govern confidentiality. State laws will vary and it is important to be familiar with your states regulations. Above all else, it is imperative to recognize that nothing said in the massage or bodywork session by your client shall be repeated. It is your role as the practitioner to respect the thoughts and feelings of clients' when they tell you something in confidence. A massage therapist must also acknowledge the confidential nature of the professional relationship with clients and respect each client's right to privacy.

There is also a federal law to be aware of when addressing confidentiality. The Health Insurance Portability and Accountability Act (HIPAA) of 1996 protects consumers confidentiality. There are many facets of this law and most of them do not pertain to massage therapists, but one of the main concepts according to the HIPAA Law is the privacy of protected health information. Written consent must be given in order to share a client's protected health information with anyone, including immediate family members. This law requires the Federal Department of Health and Human Services to establish national standards for healthcare practitioners. It also addresses the security and privacy of health data. With these new standards the hope is to improve the efficiency and effectiveness of the nation's health care system. To read more about the current HIPAA law visit <http://www.hipaaplus.com/abouthippa.htm#standards>.

GENERAL BUSINESS PRACTICES

Maintaining ethical values and professionalism also involves engaging in moral business practices. The proper **framework** for your massage practice will set the stage for professional interactions and gain you the respect of your clients and peers. Framework refers to the things we do to define our business practice. Proper framework will allow your clients to fully trust in you as a credible therapist. Framework helps us to define our boundaries within our professional relationships. Many massage therapists do not realize the impact that business practices have on performing a massage or bodywork session. Predetermining your fee, phone conversations, financial records and intake forms can help you to avoid conflicts of interest. For example, you may have a script for handling phone calls when a new client would like to make an appointment. If you know the information you are looking for you may avoid scheduling someone looking for services that you do not provide. If you have medical charts and licenses and certificates hanging in your office, you will portray the message that you only engage in professional therapeutic massage practices. Following are some examples that you may want to think about incorporating into the framework of your practice if you have not already:

- ◆ Script for new client phone calls
- ◆ Let nothing interrupt a massage session
- ◆ Being fully aware and present during a massage session
- ◆ Hang anatomical charts and professional posters in your massage room
- ◆ Keep records in a safe and confidential place
- ◆ Purchase professional business cards
- ◆ Send birthday cards
- ◆ Send thank you cards when a client refers someone to you
- ◆ Call clients who miss a massage session without rescheduling
- ◆ Have every client sign an informed consent form
- ◆ Post fees visibly in your office

The National Certification Board for Therapeutic Massage and Bodywork outlines standards of business practices that should be adhered to as a nationally certified therapist. The Board establishes that the therapist shall practice with honesty, integrity, and lawfulness in the business of massage and bodywork. As a professional, according to the *NCBTMB Standard IV*, the practitioner must:

- ◆ Furnish a physical setting that is safe and meets all applicable legal requirements for health and safety
- ◆ Maintain liability insurance
- ◆ Maintain adequate progress notes for each client session, if applicable
- ◆ Accurately and truthfully inform the public of services provided
- ◆ Honestly represent all professional qualifications and affiliations
- ◆ Promote his/her business with integrity and avoid potential and actual conflicts of interest
- ◆ Advertise in a manner that is honest, dignified, and representative of services that can be delivered and remains consistent with the NCBTMB Code of Ethics
- ◆ Advertise in a manner that is not misleading to the public by, among other things, the use of sensational, sexual or provocative language and/or pictures to promote business
- ◆ Comply with all laws regarding sexual harassment
- ◆ Not exploit the trust and dependency of others, including clients and employees/co-workers
- ◆ Display/discuss schedule of fees in advance of the session that are clearly understood by the client or potential client
- ◆ Make financial arrangements in advance that are clearly understood by and safeguard the best interests of the client or consumer
- ◆ Follow acceptable accounting practices
- ◆ File all applicable municipal, state and federal taxes
- ◆ Maintain accurate financial records, contracts and legal obligations, appointment records, tax reports and receipts for at least four years

INFORMED CONSENT

Included in your framework should be some kind of way to address **informed consent**. Informed consent can be either verbal or written and is defined as a client that knows and understands the nature of massage therapy, the procedure involved and that they have the right to end the session at any time. Informed consent not only creates a professional boundary but it also allows the client to trust in you and the service you will be providing. Clients also need to understand any possible risks associated with their health and receiving a massage, and your scope of practice as a massage therapist. Prior to receiving a massage, you should explain to your client that results vary from person to person and if they are not getting the results that they desire you will refer them to another healthcare professional. Informed consent protects you as a therapist and your clients as consumers. It is a right of every client/patient in every healthcare profession. Informed consent is upheld by the National Certification Board for Therapeutic Massage and Bodywork's code of ethics which states:

“Respect the client’s right to treatment with informed and voluntary consent. The NCTMB practitioner will obtain and record the informed consent of the client, or client’s advocate, before providing treatment. This consent may be written or verbal.”

ROLES AND BOUNDARIES

As mentioned on page 5, professionalism in the massage therapy field requires us to define and set proper boundaries. Boundaries clarify the therapist’s and the client’s expectations and limitations. Boundaries are also defined by the **role** that we play as a practitioner. Role is defined at <http://www.dictionary.com> as:

“The characteristic and expected social behavior of an individual. A function or position. The actions and activities assigned to or required or expected of a person or group.”

Avoiding multiple relationships with our clients helps to make clear what our boundaries are. Multiple relationships happen when the practitioner has two or more roles to play with one client. Multiple relationships with a client, for example, include working on a friend or a family member. Our role as a therapist is compromised by our personal relationship with the client. It is very discouraged in the massage therapy field to maintain multiple relationships with clients. It is very difficult to remain professional when

this situation occurs. Your personal lives, opinions and problems should remain out of your massage and bodywork session. You should always refrain from offering advice to the personal needs and troubles of clients. The inherent boundary as a professional bodyworker can be defined as this:

The client comes to us for a massage or bodywork session. We do what we are trained to do and what the client has contracted us to do within the scope of practice. In return the client will pay us a predetermined fee in exchange for the service.

The National Certification Board for Therapeutic Massage and Bodywork has summarized the professional roles and ethical boundaries that a nationally certified practitioner should uphold. As listed at www.ncbtmb.com, *Standard V* a professional therapist in his/her role shall:

- ◆ Recognize his/her personal limitations and practice only within these limitations
- ◆ Recognize his/her influential position with the client and shall not exploit the relationship for personal or other gain
- ◆ Recognize and limit the impact of transference and counter-transference between the client and the certificant
- ◆ Avoid dual or multidimensional relationships that could impair professional judgment or result in exploitation of the client or employees and/or co-workers
- ◆ Not engage in any sexual activity with a client
- ◆ Acknowledge and respect the client's freedom of choice in the therapeutic session
- ◆ Respect the client's right to refuse the therapeutic session
- ◆ Refrain from practicing under the influence of alcohol, drugs, or any illegal substances (with the exception of prescribed dosage of prescription medication which does not significantly impair the certificant)
- ◆ Have the right to refuse and/or terminate the service to a client who is abusive or under the influence of alcohol, drugs, or any illegal substance.

PREVENTION OF SEXUAL CONDUCT

An aspect of dual relationships and roles as professionals that must be avoided in all situations is the engaging in sexual contact with a client. The National Certification Board for Therapeutic Massage and Bodywork, the American Massage Therapy Association and all of the states that license for professional massage therapy make note and stress the importance of avoiding sexual contact with a client. In the National Certification Board's code of ethics it reads that a nationally certified practitioner shall:

“Refrain, under all circumstances, from initiating or engaging in any sexual conduct, sexual activities, or sexualizing behavior involving a client, even if the client attempts to sexualize the relationship.”

The National Certification Board for Therapeutic Massage and Bodywork states that you may not engage in any sexual relationship with a client for a minimum of six months after the therapist/client relationship has been terminated. By participating in any type of sexual behavior you risk losing your license and professional affiliation. Your respect as a massage therapist is lost if you engage in such behavior with clients. In addition to national code and state law there are also a number of guidelines to follow in order to prevent the uncomfortable feelings that occur when a sexual situation arises. These guides are set to protect yourself as well as your clients.

- ◆ Use proper **draping** – do not expose any more of the client than professional necessary. Proper draping will be discussed in detail later on.
- ◆ Do not ever touch the genitalia of any client at any time or for any reason
- ◆ Avoid the use of jokes and conversation that involve sex
- ◆ Avoid discussing the subject of sex with a client at any time during the session
- ◆ Do not ever have any kind of sexual contact with the client outside of your office or professional setting – this can promote a sexual advance during a bodywork session

- ◆ Screen new patient phone calls to be sure that you can provide the service that a client is looking for.

Some massage therapists freely state in the initial phone conversation and before the first bodywork session something to the order of:

“All of my services are strictly professional and I do not provide or permit any type of sexual conduct at any time during the session.”

This may seem like a bold and forward statement but it prevents you and your clients from feeling uncomfortable and violated during a massage. Because our work is so personal it is sometimes difficult to determine what is crossing the boundary and what is not. If you have a client that you feel uncomfortable about for any reason it is your right and obligation to either terminate the session or make notice of it to your client. If you do nothing you risk losing your respect as a professional and the respect that the massage therapy profession has come to advocate.

Along with preventing sexual behavior, another provision to be aware of is **transference**. Transference is defined by the National Certification Board for Therapeutic Massage and Bodywork as when:

“A client’s unresolved feelings and issues are unconsciously transferred to the practitioner.”

Transference can be sexual or non-sexual related. Transference from clients usually comes from unresolved childhood issues. Transference is more likely to happen with massage and bodywork because of the closeness of the relationship and the constant touch from the therapist. Transference can be positive or negative. Being aware of this possibility can help therapists react and be compassionate toward the client’s feelings. When you feel like a client is transferring unresolved emotions or issues you do not necessarily need to end the session or make a notice of it to your client. It is significant to be aware of it and the impact that it may have on you. Another component of transference is **counter-transference**. Counter-transference occurs when the therapist’s unresolved feelings and issues are unconsciously transferred to the client. As with transference this can be positive or negative and can be brought on from childhood issues. Being tentative of this effect may help you to better perform as a massage therapist. One thing you do need to remember about transference and counter-transference is to be able to distinguish it and limit the impact of it between the client and the therapist.

DRAPING

Using proper draping will also promote the prevention of sexual conduct. Draping allows for providing a relaxing comfortable environment for your clients. The process of draping involves keeping the client covered at all times during the session. Only the body part being worked on is exposed, and when you are finished it is recovered. The draping must be secure and must never leave the client wondering what may be exposed. Draping provides warmth and a feeling of safeness. Many clients feel vulnerable and exposed taking their clothes off to let you massage them. Secure draping alleviates their anxious feelings. Draping is also required in many states and is mentioned by the National Certification Board for Therapeutic Massage and Body Work in its code of ethics. Summed up it states that the therapist must provide proper draping and bodywork in a way that guarantees the safety, comfort and privacy of the client. In providing safe draping for the client it is essential to provide clean linens for each client. Providing clean linens meets many states minimum requirements for hygienic practices and health and safety.

Clean linens and proper draping are an indispensable part of professionalism and ethical massage practices. There are several types of draping that may be used.

- ◆ Diaper draping
- ◆ Top cover method
- ◆ Full sheet draping

Diaper draping involves the use of towels or sheets to cover only the genitals (and breasts for a woman) of your clients. It is only suitable when the bodywork room is very warm and the client will not chill. Diaper draping does not cover the entire body and may leave your client feeling exposed. If you chose to use this method of draping ask for feedback and ask the client to adjust the drape if he/she is uncomfortable in any way.

The top cover method involves the use of a covered massage table with a large towel or sheet to cover the client's whole body from the neck down. The cover sheet may be used as a wrap for the client to walk from the changing area to the massage table. This type of draping provides more warmth and security while providing more privacy as well. With the top cover method the therapist only uncovers the area being worked by tucking the sheet under the arms or legs as needed. This type of draping is usually the easiest and most common form of draping used because it provides warmth and security for the client and at the same time is practical for the therapist.

The full sheet method uses a large (full size flat) sheet that covers the table and wraps around the client at the same time. This method provides more security and coverage than diaper draping, but an additional sheet or towel is required for the client to get from the changing area to the table. The uncovering process is similar to the top cover method. Only the body part being worked on is exposed and then covered after the area is finished. Whatever draping method you choose you should always keep in mind the best interest of the client. Respecting the privacy as a client is a primary rule in providing the most relaxing environment. You cannot give the client your best treatment if they are feeling exposed or vulnerable at any time.

CONTRAINDICATIONS AND REFERRING OUT

To provide ethical and professional services as a massage therapist you must be aware of the **contraindications** to massage and bodywork and you must also know when it is appropriate to refer a client to another healthcare professional. Some common contraindications in massage therapy are:

- ◆ Abnormal body temperature – Massage is contraindicated when a person has a body temperature of 99.5 degrees F.
- ◆ Acute infectious disease – Colds and influenza are good examples of these. The therapist is at risk and massage may aggravate the condition.
- ◆ Inflammation – Where there is acute inflammation on an area of the body massage is not advisable because it could further irritate the area. Inflammation from tissue damage and bacterial infection are also included in this.
- ◆ Varicose veins – Clotting may be present in the veins and massage therapy may free clots.
- ◆ Blood clotting – Massage may free clots enabling them to move to the heart, brain or lungs.
- ◆ Aneurysm – An aneurysm is a local dilating of a blood vessel and massage the area may cause rupture.
- ◆ Skin rashes, open wounds or sores – Rash may spread and will put the therapist at risk for disease.
- ◆ High blood pressure – Under certain circumstances it is okay to perform a massage, but you may want to refer the client to their primary care physician.
- ◆ Certain types of cancer – Massage may further complicate the condition and spread disease.
- ◆ Certain medications – Be sure to ask the client what medications they are taking. If you are in doubt, do not perform the session.
- ◆ Heart disease – Massage therapy may cause additional stress
- ◆ Bone breaks and fractures – These are often accompanied by swelling and should not be massaged.
- ◆ Communicable infections – the therapist is at risk and massage may spread disease.
- ◆ Inability to give informed consent – This puts the therapist and their practice at risk.
- ◆ Severe burns – May complicate the condition.

It is the responsibility of the massage practitioner to be current and aware of possible precautions to massage. Without the knowledge of contraindications practitioners cannot provide the highest quality ethical service to clients. If you are ever in doubt it is best to refer the client to their primary care physician and wait for

approval before performing the massage session. This will protect you as a therapist and will also protect the client from possible harm. The National Board for Therapeutic Massage and Bodywork cites referring clients to the appropriate healthcare professional and states in their code of ethics that a nationally certified practitioner shall:

“Acknowledge the limitations of and contraindications for massage and bodywork and refer clients to appropriate health professionals.”

RECORD KEEPING PROCEDURES

Record keeping is a vital part of practice for a professional bodyworker, especially if you would like credibility as a healthcare professional. Record keeping protects you as a therapist and benefits your clients. In addition, it is also important to keep proper records for legal reasons. The length of keeping records varies according to state and local laws and should be kept at a minimum of four years.

The first time a client visits your office **initial intake forms** are an excellent way to gather information about the client and the kind of massage procedure they are expecting. The initial intake forms allow you to make the right decision and help you to provide the highest possible quality of care. Initial intake forms should include:

- ◆ Client’s name and address – You may want to use this later for marketing purposes
- ◆ Any problems that they may be currently experiencing
- ◆ A primary care physician incase you need to contact them for an emergency
- ◆ A close relative incase you need to contact them for an emergency
- ◆ Family history – This may help you to determine any contraindications to therapeutic massage
- ◆ A signed informed consent – This is for the protection of you and the client

Another form that you may want to have your clients read and sign for awareness of is your office policy. This will make clear to every new client the expectations of you as a therapist and the expectations them as a client. It will clarify your role as a professional and may answer some common questions that new clients have. Your office policy form should include the following points:

- ◆ An informed consent
- ◆ A statement that you do not provide and sexual services
- ◆ That you do not diagnose
- ◆ That you do not prescribe any type of medication or supplement
- ◆ Your policy regarding missed appointments
- ◆ Your policy regarding late arrival
- ◆ Your policy regarding payment and what type of payment you accept
- ◆ That the client has the right to end the session at any time

SOAP CHARTING

In addition to initial intake forms, professional massage therapists should keep daily treatment records according to some state laws. The treatment records should state the date of visit, what was done, observations of the therapist and actions taken. **SOAP charting** is often utilized for this purpose. The acronym SOAP stands for:

- ◆ Subjective
- ◆ Objective
- ◆ Assessment
- ◆ Plan

Subjective data is information that the client relates to you for that daily visit. For example, if a client states that he/she is very sore in the low back from lifting you would document that information here. Anything

you think may be relevant to your treatment of the client that he/she tells you should be written and documented in the subjective portion of your notes.

Objective data is the information that you gather based upon the results of your testing or bodywork. This also includes your observations. For example, if you notice swelling in a client's ankle, you would document that here. Any observation that you make regarding that client on that day should be written and documented in the objective portion of your notes.

The assessment portion refers to what techniques you utilized or what you did to the client on that particular visit. An example of this would be to write that you performed a one hour Swedish massage with emphasis on the lower back region. Any treatment provided on that particular day needs to be documented in the assessment portion of your notes.

Plan refers to the proposed course of treatment for your client. If you recommended that a client return for another massage in two weeks you would document that as your treatment plan. Any recommendation you make to the client on that particular day should be documented and written in the plan portion of your notes.

The subjective data is gathered and documented before the session begins based upon what the client states to you. The objective, assessment and plan are all formulated after the session has ended based upon what occurred during your interaction with the client. SOAP charting is a simple and effective way of tracking progress of clients. SOAP charting helps you to observe treatment outcomes and can show the client how they have progressed through the course of bodywork treatment. Documentation can be useful in a court of law if necessary. SOAP charting is incorporated in to some state laws and is mentioned by the National Certification Board for Therapeutic Massage and Bodywork in the general business practices section of their standards of practice. Any client information documented is protected by confidentiality and should never be shared with anyone without signed consent from the client.

A client is entitled to request to see their chart at any time. A release of medical information form is also a good idea to have in your practice in the event that another healthcare professional needs to review the information. If you ever need to refer the client to their primary care physician a release form will be practical. The form should contain a statement that reads something like this:

"I, Client Name , give my permission to Your name or business name , to share my health information with Doctor, healthcare professional or family member , regarding my treatment received at Business name ."

The form has to be signed and dated to be valid. In addition to client records, your own personal business records are vital to your practice. Licenses, tax forms, insurance coverage and continuing education verification should be kept in a safe place and maintained for at least four years. Business record keeping may vary from state to state and you should make it a point to find out what your state and/or local law requires.

CONCLUSION

As discussed, all of the major issues for massage therapists concerning law, ethics and professionalism have been covered. Each licensee/nationally certified practitioner is ultimately responsible for learning their national, state and local regulations governing the practice of therapeutic massage. Each year laws and regulations may change. This course is based upon the most current information available. Listed below are some websites that may be helpful in locating pertinent state law information. Also listed are sources used for the course and the National Certification Board for Therapeutic Massage and Bodywork's code of ethics and standards of practice links. The American Massage Therapy Association's code of ethics and standards of practice are included as well.

RESOURCES

NCBTMB Sites and sources:

- ◆ http://www.ncbtmb.com/ethics_&_standards.htm
- ◆ http://www.ncbtmb.com/standards_of_practice.htm

AMTA sites and sources:

- ◆ <http://www.amtamassage.org/about/codeofethics.html>
- ◆ <http://www.amtamassage.org/about/standards.html>

Other sources used in creating this course:

- ◆ <http://dictionary.reference.com/>
- ◆ The Educated Heart: Professional Guidelines for Massage Therapists, Bodyworkers and Movement Teachers
- ◆ Milady's Theory and Practice of Therapeutic Massage, 2nd Edition
- ◆ Natural Wellness: Ethics for the Massage Practice
- ◆ <http://www.hipaaplus.com/abouthippa.htm#standards>

Ethics in Massage – Roles and Boundaries Exam

1. What are ethical guidelines?
 - a. Values and ideas for making proper decisions in the best interest of all parties
 - b. The framework of your practice, such as business hours
 - c. Guides to follow in order to diagnosis your client's condition
 - d. All of the above
2. In order to uphold and keep a professional massage practice you should:
 - a. Follow the NCBTMB's code of ethics
 - b. Adhere to your local and state laws
 - c. Refrain from diagnosing a client's condition
 - d. All of the above
3. Your education, training and licenses should be displayed and accessible to the public.
 - a. True
 - b. False
4. Which of the following are components of professionalism?
 - a. Acting in an unfriendly manner and wearing whatever you feel like that day
 - b. Paying attention to our client's needs and acting in a manner that is polite
 - c. Disregarding state and local laws
 - d. All of the above
5. Confidentiality, while imperative in other healthcare professions, is not applicable to massage therapy.
 - a. True
 - b. False
6. Which of the following cases is acceptable to break confidentiality?
 - a. Your client reveals to you that they are having an affair and you would like to inform their spouse
 - b. Your client reveals that they have an eating disorder and you would like to discuss this with a colleague
 - c. You receive a court order to produce your records on a client's treatment
 - d. All of the above
7. It is important to be aware of your state laws regarding confidentiality so you know what may possibly be required of you as a therapist.
 - a. True
 - b. False
8. What does HIPAA stand for?
 - a. Health Insurance Protective Act of 1996
 - b. Human Informative Protective and Accountability Act
 - c. Health Insurance Portability and Accountability Act
 - d. None of the above

9. Informed consent can be either verbal or written.
 - a. True
 - b. False

10. What are boundaries?
 - a. Defined behaviors that clarify the therapist's and the client's expectations and limitations
 - b. The way we define our relationships as professional
 - c. Defined behaviors that clarify the proper relationship between the client and the therapist
 - d. All of the above

11. Which of the following is an example of a multiple relationship with a client?
 - a. Meeting a client for the first time in your practice
 - b. Dating someone who becomes a client of yours
 - c. Seeing a client who was referred from another healthcare professional in which you have never met
 - d. All of the above

12. In some cases, our role as a professional massage therapist can be compromised by a multiple relationship with a client.
 - a. True
 - b. False

13. According to the NCBTMB's Standard V, a professional massage therapist shall:
 - a. Avoid a sexual relationship with a client
 - b. Respect the client's rights
 - c. Refrain from practicing massage therapy under the influence of drugs or alcohol
 - d. All of the above

14. In order to avoid a potential inappropriate sexual situation with a client, it is suggested that you:
 - a. Use proper draping
 - b. Do not ever touch the genitals of any client, male or female
 - c. Never engage in sexual contact with a client
 - d. All of the above

15. Because a massage therapist's work is so personal, it is sometimes hard to determine what is crossing a boundary and what is not.
 - a. True
 - b. False

16. An example of transference from a client could be:
 - a. A client that enjoys their massage therapy session and returns on a regular basis
 - b. A client that sees you frequently and begins to share details of a past relationship with you
 - c. A client that asks you to spend more time on their back during a massage session
 - d. All of the above

17. Counter-transference is the same thing as transference.
- a. True
 - b. False
18. Which of the following is an example of the top cover method of draping?
- a. Using a towel or sheet to cover only the genitals of your client
 - b. Using a full size flat sheet to cover the client and the table at the same time
 - c. A covered massage table with an additional large towel or sheet to cover the client
 - d. None of the above
19. As part of your role as a professional massage therapist, it is important to be familiar with contraindications to massage and when to refer your client to another healthcare professional.
- a. True
 - b. False
20. Information that should be included on your initial intake form includes:
- a. Current medical problems
 - b. A family history
 - c. Informed consent
 - d. All of the above

This concludes the Ethics in Massage – Roles and Boundaries exam.