



Clinical Massage SOAP Charting Format for initial intake and re-evaluation sessions

## **O** Findings: Visual/Palpable/Test Results

**Visual:** What you can see  
**Palpable:** What you can feel  
**Test results:** Muscle test, joint tests,

### Example:

**Visual:** Posture, gait, bruising, etc.  
**Palpable:** Knots, tight bands, etc.  
**Test results:** Weakness, pain on compression, etc.

## Techniques/Modalities: Locations/Duration

Location Region	Modality	Technique	Specific location	Duration
Region	Name brand	Specific technique	Specific location	How long

### Example:

Region	Name brand	Specific technique	Specific location	How long
<i>Low back</i>	<i>Deep tissue</i>	<i>Deep friction, direct pressure</i>	<i>Erector spinaea lumborum, quadratus lumborum (BL)</i>	<i>20 min</i>

## Response to Treatment (see $\Delta$ )

Put a triangle next to anything that changed during that treatment or within the next 48 hours suspected to be related to the treatment. After the triangle mark it with an up arrow or down arrow or describe the change.

Symptoms	Location	Intensity	Frequency	Duration	Onset
<i>Headache</i>	<i>Lateral (r)</i>	<i>Dull roar to full on</i>	<i>3 x per week</i> $\Delta$ ↓	$\Delta$ ↓ <i>1-4 hrs</i>	<i>Car accident 4 years ago</i>

## **A** Goals: Long-term/Short-term

These should be mutually agreed upon goals from practitioner and client. Attempt to commit to goals for each symptom prioritized above.

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**OPTION A:** Use “goals” to set specific goals related to what degree you would like to decrease pain and use “functional outcomes” to humanize the need. What is the specific task they are limited in or kept from doing as a result of the symptom.

**OPTION B:** Use goals to cover both degree you would like to decrease pain & to humanize the need. What specific task they are limited in or kept from doing as a result of the symptom. Then use, “functional outcomes” at the re-evaluation intake or the half way point to assess the overall response to long-term treatment plan.

**Short Term Goals**

**Long Term goals**

*Within the next 2 weeks to a month*

*Within the duration of the treatment plan*

**Example:**

**Short Term Goals**

**Long Term goals**

OPTION A: *headache frequency & duration*

*headache frequency and duration by 75%*

OPTION B: *headache frequency & duration, sit at computer without pain for 30m periods*

*headache frequency and duration by 75%  
To sit at computer, without pain for entire shift*

## Functional Outcomes

**OPTION A:** Client wishes to pick up grandchild one weekly visits without fear of pain or dropping the child.

**OPTION B:** Client feels stronger and safer when picking up granddaughter. Shoulder ROM now 90\* and Strength gained by 20%

## **P** Future Treatment/Frequency

Spell out the treatment plan for the next few months. Remember consistency is important. It is also important to set a re-evaluation date so you can check in with the client on how the treatment is going.

**Example 1:** “Repeat same Treatment, once a week for 4 months” Abbreviated like this: “RST 1xWx4M”

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**Example 2:** "Alternate Same Treatment with Full Body Swedish Massage for 4 months" Abbreviated like this: "AST w/ FBSM 1xWx4M"

## Homework/Self-care

Homework

Self-Care

Fact-finding missions for your clients:

Home Treatment:

What aggravates? What relieves?  
When does it hurt? For how long?

Things the client knows help, we assign that as self-care.  
Therapist may also give strength training, conditioning, stretching, etc.  
Some practitioners assign meditations, breathing exercises, etc.  
As a client finds out what helps, that becomes a part of their self-care regimen.  
As a client finds out what hurts, avoiding activities that hurt also become a part of self-care routine.

### Examples:

#### Homework

#### Self-Care

*Headache:*

*Try eliminating common allergens, changing computer posture, and wearing sunglasses.*

*Headache:*

*Posterior neck stretch.  
Take breaks every half hour when doing computer work.*

*Low back pain:*

*Make conscious effort to see if it hurts in the morning, midday, and evening. Try to connect activities to pain. Low back stretch such as child's pose and down dog.*

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Adapted from (and designed to be used alongside) the book, "Hands Heal: Communication, Documentation, and Insurance Billing for Manual Therapists" - Diana L. Thompson LMP