CLIENT CONSULTATION ASSESSMENT AND DOCUMENTATION

It is important for a practitioner to consult and screen all clients. A client's information can be valuable to practitioners. However, a client may be seeking medical attention for health situations that are outside the scope of practice for a foot zone practitioner. Therefore, it is important for the practitioner to consult and screen all clients.

A client consultation should include the following:

- Have open and effective communication with each client by explaining all practitioner policies and procedures.
- Determine each client's needs and expectations by having them complete intake and medical history forms.
- Once the practitioner has read through and assessed these forms, the practitioner needs to perform a preliminary assessment.
- After the assessment, the practitioner should explain the benefits of a foot zone session. Never promise any results. Prognosticating or foretelling the future of one's health is illegal. Have the client sign a consent form before starting a foot zone session.

INTERVIEWING THE CLIENT

An interview helps set the tone of the practitioner/client relationship. A client's first impression of the practitioner can be lasting, therefore, the practitioner needs to be prepared by having themselves and their room ready. Always greet the client in a friendly, professionally way. Look clients straight in the eyes when consulting with them. Be courteous and keep the interview relaxed.

CLEAR COMMUNICATION

It is important to explain the practitioner's or company's policies and procedures in a clear manner to assure the client understands them. Pay attention and listen well, checking in with the client often. Be aware of the client's communication style as well as his or her emotional and mental state. It is vital to communicate at the level of the client's comprehension and form of communication. Some comprehend better through either words, touch, talking, or listening. Also pay attention to the way a client expresses himself or herself to include body language.

NONVERBAL COMMUNICATION

Body language often speaks louder than words. Therefore, be observant of the way the client holds his or her body and where he or she holds tension, etc. Check to see if the client appears open and engaged or nervous and anxious. Many clients will say one thing, but their body language may say something completely different.

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DURING CONSULTATION

Ask open-ended questions. These are questions that do not end with "yes" or "no", allowing for more information from the client. Allow the client enough time to explain his or her answer. Then summarize, by repeating back to the client what he or she said to be sure you understand them correctly.

POLICIES AND PROCEDURES

Policies and procedures are principles, rules, and guidelines that are formed by the practitioner to have healthy boundaries to protect themselves and their clients. A policy is a non-negotiable rule; such as price, packages offered, appointment times, cancellation instructions, who and/or where a practitioner is willing to foot zone, etc. Procedures are detailed descriptions that are narrower in focus on how the practitioner's policies are carried out and adhered to.

They can include a disclaimer that a practitioner's services are not a medical treatment. There is no specific manner to present these policies. They can be posted on walls, printed on intake forms, or stated verbally. Be sure to uphold the policies you make.

PRACTITIONER'S EXPLANATION OF SERVICES

- Explain the benefits of a Foot Zone.
- Explain procedures that need to be followed during the session.
- Explain procedures that clients need to follow during their visits.
- Keep clients informed about what is being done and why, as this is important.

Being able to answer questions adds to a practitioner's professional credibility and helps build client confidence. A practitioner can explain the types of modalities, benefits, training, years of experience, and one's professional affiliations. A practitioner can also define his or her business policies, such as appointment policy, work schedule, days and hours available, late or missed appointments, boundaries, and inform that all client information is confidential. Also explain fees, costs, and/or charges; the practitioner's form of billing; whether the practitioner takes cash, check, Venmo, direct deposit, or charge; offers they discount, such as gifting $10 towards their session; and insurance. It is also important for the practitioner to define "session procedures". This would include length of a session, work schedule, intake forms to fill out, client dress attire, sequence or protocol, talking during a session, music or not, and a protocol after a session, such as drinking water, etc.

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DETERMINE CLIENT'S NEEDS AND EXPECTATIONS

It is important for the practitioner to learn what the client's main and secondary concerns are. Ask if the client has received a foot zone previously. Has the client explained the type of foot zone he or she received, such as light, deep, with oils or creams, etc.? Ask the client what he or she thought of the foot zone session and find out what the client's expectations for the session is. Is the client's goals for the session reasonable or attainable? Are there any contraindications? Is it necessary to refer the client to another healthcare professional before performing any foot zone services?

INTAKE AND MEDICAL HISTORY FORMS

Always record any other verbal information the client may provide. If a client asks, be tactful in explaining reasons for filling out forms. Ask clarifying questions. Use body diagram forms (get a Body Diagram chart and Foot Zone Orientation chart) and have the client point to areas of concern.

PRELIMINARY ASSESSMENT

- This assessment should include a client history and observation to help disclose the physiological conditions about their mental, emotional, and physical health.
- A history form details a client's previous conditions.
- Observation by the practitioner helps him or her notice how the client holds his or her body, moves, and responds or reacts to certain questions.
- Continual monitoring by the practitioner helps assess the client's responses to the foot zone.

DEVELOP A PLAN

No two clients are the same. Every client will need personalized amounts of foot zone sessions. Muscle testing the client after a foot zone helps the practitioner assess when the next session is needed, while allowing the client to feel the muscle response. Once the test is done, it is up to the client to decide whether or not he or she wants to reschedule another appointment. Utilize the intake and history forms to provide information, always including previous sessions to assess the health advancements the client is making. The practitioner should also consider referring their client to other health care practitioners if their client's health needs seem to be beyond the scope of practice of foot zoning. Help educate the client in areas of focus discovered in the foot zone session and encourage them to prioritize their health needs and responsibilities to meet those needs.

CLIENT CONSULTATION ASSESSMENT AND DOCUMENTATION

INFORMED CONSENT

Clients who are informed and can be in more control of their health practice when the practitioner describes the session, techniques, and possible side effects. The client should always agree to treatment before the practitioner starts a session. The practitioner should always make it clear to the client that he or she can refuse the session at any time or suggest changes or modifications. The practitioner must comply with any refusal of services by the client. Therefore, a signed consent may be required in some states or jurisdictions. Consent for any new procedures added later should also be required. Before each session, discuss the client's needs and session plan.

DOCUMENTATION AND CLIENT FILES

Components:
- Intake Form (name, address, phone, email)
- Medical History
- What modalities will be performed during a session
- Informed Consent
- Medical Information Release forms
- Recorded Session or SOAP Notes
- Financial Records
- Billing Information

Reasons to document:
- It is helpful for marketing.
- It helps you achieve better results by learning what worked and didn't work.
- It details the client's preferences.
- It is used as a basis for creating treatment plans.
- It serves as legal evidence that verifies what took place during the session.
- It is essential for a professional practice.

UPDATING RECORDS

Keeping accurate records and updates of the client's condition, tolerance, and reactions permits the therapist to render more effective treatment to achieve better results.

- Review your records before each session.
- Do not rely on just memory.

CLIENT CONSULTATION ASSESSMENT AND DOCUMENTATION

CONFIDENTIALITY

- All records should be kept in a secure place.
- A practitioner should not divulge information about a client's personal matters without written consent of the client, and then only when the exchange of such information is for the client's benefit.
- Get written approval when consulting with a client's physician or other health care professional.
- Confidentiality guarantees the non-disclosure of privileged and private information that is shared during a therapeutic session.
- Client's identity must be kept private.
- Confidentiality is necessary for trust.

HIPAA - Health Insurance Portability and Accountability Act
(Not all therapists must comply, it depends on the state.)

- Informed consent
- Signed release states HIPAA compliance
- File storage, lockable, fireproof
- Password protection necessary for electronic files
- Client files must stay out of view
- Cannot use sign-in sheet unless names are hidden from others
- Washington required this for massage; chiropractors have to be HIPAA compliant