



Case Management and Student Assessment

CASE MANAGEMENT

Proper case management includes:

- Doing a thorough assessment at the first session with each new student.
- Keeping detailed notes of each session.
- Keeping all session notes and communication confidential.
- Keeping all session notes for a minimum of three years, and disposing of them in a secure manner.
- Educating the student on expectations for the learning process (number of sessions, frequency of sessions, frequency of exercise practice at home).
- Communicating with the student in a timely and professional manner in between sessions.
- Scheduling sessions in an organized manner, and not canceling or rescheduling unless absolutely necessary.

It is important to keep detailed notes of each session; this serves both you and your student. Detailed notes allow you to remember what you have already taught the student and prepare for future sessions. Notes also prevent your student from having to repeat themselves; detailed notes respect your student's time and energy. Notes regarding your student's pain levels and other symptoms are helpful for both of you in allowing you and the student to gauge their progress. During sessions, you should solicit only information that is relevant to your work with them in addressing their musculoskeletal issues.

All written notes, written communication, and anything verbally discussed during your sessions with a student must remain confidential unless requested by the client in writing, medically necessary, or mandated by law. It is a professional standard that you keep student notes for a minimum of three years, and dispose of them in a secure manner.

In your first session with a new student, it is important to set their expectations for what the learning process will entail. They should understand that:

- Sessions will last 60-90 minutes, and will take place no more than once per week in order to allow time for homework practice and integration in between sessions.

- They must practice the self-care exercises on their own on a regular basis (ideally every day) in order to effectively retrain their nervous system.
- They should attend a minimum of three sessions in order to learn the basic self-care exercises; and in many cases, more than three sessions are required.

STUDENT ASSESSMENT

It is important to assess your student before working with them so that you can:

- Teach them exercises that address their habitual patterns and areas of pain.
- Refer back to your assessment notes before each session with your student.
- Keep notes at each session regarding their progress.
- Discuss other lifestyle factors that may be affecting their pain levels (when appropriate).

ASSESSMENT IN A GROUP CLASS

If you are teaching Clinical Somatics exercises in a group movement class, then you will likely not have the opportunity to do individual assessments. When teaching the exercises in a group setting without the opportunity to do individual assessments, you should make sure your students know that they are in charge of their experience with the exercises. They should not feel pressured to do the exercises if they cause discomfort or pain. In this scenario, you can give general instructions to the class such as:

“This exercise will help you release and gain control of your lower back muscles, and help to relieve lower back pain. If it is not comfortable for you, you can make the movement smaller, or skip the exercise and simply rest in a comfortable position while breathing deeply into your lower belly.”

ASSESSMENT IN INDIVIDUAL SESSIONS

When you are working with a student individually, doing a detailed assessment is crucial. The important information that you want to get from your student is:

- Their profession and regular daily activities, and time spent doing each
- What pain, conditions, sensations and symptoms they are experiencing, and for how long they have been experiencing them

- Medical history, including any diagnosed conditions, injuries, major illnesses, surgeries, and medications, and when they occurred

After obtaining this information, you will make observations of your student's posture. The most efficient way to do this is by observing them while they are doing the Standing Awareness exercise. While you are talking them through the exercise, they will be standing in a relaxed position with their eyes closed. This is the ideal way to observe them, because they will be standing in their habitual posture. Observe your student from the front, back, and both sides – you will have to quietly walk around them in order to do this. You should let your student know that you will be walking around to observe their posture so that they are not surprised by it. Write down your observations so that you can refer to them at the end of the session and at future sessions. You can share your observations with your student after they have described their internal observations from the Standing Awareness exercise.

On the next page is the Assessment Form that I use when doing individual sessions. You can alter it as needed in order to suit your style of assessment, but make sure that you gather all of the pertinent information.

Clinical Somatic Education Assessment Form

Student Name:	Session Date:	Time:
Practitioner:	Location:	Student Birth Date:
Referred By:	Handedness: R L A	Height:

Profession/Regular activities:

Presenting complaints:

Medical history (Diagnosed conditions, Injuries, Surgeries, Major Illnesses, Medications):

Observations:

Exercises taught in session:	Student homework:	Notes, Future plans:
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