



Creating A Professional Practice

Student Handbook

IPSB -International Professional School of Bodywork

*Compilation of Handouts
for Creating a Professional Practice Course*

OVERVIEW

***Professional Portfolio
Visioning***



CREATING A BUSINESS PORTFOLIO

What is a Portfolio?

A portfolio is a collection of samples of your work, your education, and your experience. It communicates your abilities, accomplishments, interests and talents. Your portfolio is used to show others what you have learned and accomplished.

The portfolio you will create for this class is focused on your massage and bodywork education and career. It will include information about your IPSB education up to now. Most of the assignments you will do in the "Creating a Professional Practice" class will be included as well. When you complete this class your portfolio will show the work you have accomplished and your blueprint for your future.

This portfolio is about YOU - your work, your education, and your accomplishments. It's your story about your career in bodywork.

What is the purpose of creating a portfolio?

This is the beginning of your professional portfolio. The bottom line is that it gathers, in an attractive format, information about you and your career. Your portfolio can help you in seeking employment, going on job interviews, doing presentations about you and your practice, writing your brochures, doing networking, telling prospective clients and referral sources about you, etc. ETC. This can easily be the beginning of an ongoing, inclusive document that you add to over the years of your career.

How is a portfolio developed?

A portfolio is developed by considering the following questions.

Who is the audience for the portfolio?

For the Professional Practice class your audience initially is the instructor. But your real audience is yourself and your clients. Your audience might also be a potential investor in your business, a bank, a landlord or a business association.

What work and education samples have I been asked for or am I expected to provide?

For this class, specific items must be included in the portfolio. The list of those items is below.

What additional information do I want to include?

You can certainly include additional information about your education and work that is important to have represented. A list of possibilities is below as well. Brainstorm your own list.

How do I begin my portfolio?

First, gather all your materials. Make a list of everything you must and/or want to include in your portfolio. Then collect the originals or copies of all the certificates, letters, transcripts, flyers, brochures, pictures, articles, etc. that you are going to put in it.

Second, get the binder, folder, scrapbook, or whatever your portfolio format will be. You will need sheet protectors, business card holders, and divider tabs.

Third, organize all your materials in the order you want to present them. You might do it chronologically, or developmentally, or use any other organization which will represent your training and work the way you want. Let yourself be creative in how you put the materials into your portfolio.

What is this supposed to look like?

1. The portfolio should be put in an attractive and permanent binder of some kind, like a three ring notebook or scrapbook. (It doesn't have to be expensive.) It should be large and flexible enough to have room to grow as you add items later. Be sure to include section dividers.

2. It should have sheet protectors or pockets for some items.

3. It must have a title page which includes your name, the title of your portfolio, and the date it was submitted.

4. Everything should be TYPED and professionally presented.

What **MUST** the portfolio include for the Creating a Professional Practice class?

The portfolio should be divided into two major sections:

Section I- PROFESSIONAL PORTFOLIO

Section II- BUSINESS PLAN

Use section dividers for additional sections with in each major section.

Section I (Professional Portfolio) must include the following:

ITEM	ACCOMPLISHED AS
* Self-Introduction (Typed)	Class Assignment
* Resume (2 copies)	Class Assignment
* Cover letter(2 copies)	Class Assignment
* Business card (2)	Class Assignment
* Visual Promotional piece	Class Assignment
* Copy of any course certificates/diplomas	
* Copy of most recent transcript	if you have one, <i>do not get one made just for this.</i>
*	
* Samples of additional promotional materials	
* Letters of Recommendation from clients/past work associates	
* Student Massage Center Evaluations (only exceptionally good ones)	

Section II (Business Plan) must include the following:

ITEM
* Owner's Statement
* Vision & Goals
* Business Definition [incl.:Photos or drawings of your current or proposed Space].
* Philosophy
* Marketing Plan
- (3) Target Market Profiles/Descriptions
* Marketing Plan (Strategies)
* Financial information
- Fees
- Forecasting
* Client Policies
* Business organization
(Insurance & Legalities)

These Business Plan worksheets are contained within this handbook. They will give the specific information necessary to be included in each business plan

What are other items are suggested to be included in the portfolio?

- * Visual promotion pieces - personalized gift certificates, flyers, discount coupons, brochures, etc.
- * Your personal Code of Ethics - From Client Communications class.
- * Poems/Photos that illustrate your personality and personal philosophy
- * Applicable transcripts (copies)
- * Letters of recommendation-teachers, clinical supervisors
- * Letters of appreciation from clients
- * Articles you have written or articles written about you
- * Awards
- * Program flyers, outlines for presentations you have made
- * Association membership certificates
- * Flyers and/or Thank you letters from Massage volunteer participation
- * And . . .
 - 1.
 - 2.ETC.



LEARNING GUIDELINES

1. SHOW UP (Be Present)

Show Up, meaning to bring to each interaction your physical body, but more so yourself, your heart, your mind, your soul. Be Present in the full sense of awareness (physical, mental, emotional, spiritual) of the present moment.

2. PAY ATTENTION

Pay Attention to what has heart and meaning for you. In any of our individual bodyminds a hundred things can be happening; in communication with another, or others, a thousand things. Give the present moment your full attention.

3. SPEAK YOUR TRUTH

Speak Your Truth without shame or blame. Once we accept the challenge to Show Up and to Pay attention, our next brave act is to know and embrace ourselves enough to break through the destructive cycle of shame/blame, and stand fully in our truth.

4. BE OPEN TO OUTCOME

Be Open to Outcome. Perhaps the most difficult task for human beings in relationship is to be open, that is unattached to a specific outcome.

From Angeles Arriens

Building the Massage Practice of Your DREAMS

by Cyd Percin, C.M.T.

You can use the right side of your brain—the intuitive, creative, feeling, feminine, “going within” side—to create a successful practice. Whether you’re struggling to build your massage practice or take your practice to the next level, the techniques described in this article will help you on your way.

Three techniques in particular have helped people achieve fabulous results. They are: vision maps, affirmations and creative visualizations.

Mapping your vision

A vision map is a physical representation of your desires, and as such, it enables you to consciously create your world the way you want it to be. Although seemingly simple—created of paper, magazine pictures, photos and drawings—a vision map is a valuable, dynamic tool for dissolving barriers to a more abundant, prosperous and fulfilling life.

“I did not see how pasting pictures onto a piece of paper was going to improve my business,” said one woman who had created a map. “However, I decided to go ahead with it. Less than one hour afterward, my partner and I found our new office, which looked almost identical to the picture of the office I had on my map! I am now a believer in vision maps.”

Vision maps assist you in radiating a clear image of desired results. Appropriate people and things begin to resonate to the frequency that you transmit, and are drawn into the pattern to manifest the image on the three-dimensional plane of everyday living.

“After cutting out every picture of airplanes and world maps that I saw, and, listening to my subconscious, I put a map of Sweden on [my map],” said another vision map creator. “[That] was November 5. Every day I looked at the vision map. By December 14, I had a job offer and was on the plane to Sweden!”

Here are some guidelines to assist you in creating the most effective vision maps in order to get dynamic and satisfying results:

Size: Your map can be any size that is appropriate for you. It can cover the entire wall of your house, or it can be wallet-size. Many people like to create their maps letter-size so they can fit into a folder or binder. Some people fashion their maps as bookmarks; others create poster-size maps. Make it a size that will work for you.

Color: Pick a color of paper or poster board that you resonate with. You will focus on this map daily, so the color is important. Be assured that whatever color you pick will be the right one. You may want to make several maps a year so you are not stuck with the color you originally chose.

Content: Begin by cutting images and phrases out of magazines, newspapers and catalogs so that the map represents the desired result in its most ideal and complete form. Use your intuition to select all of the pictures that attract your eye, even if they do not represent what you think you want (I always gather many more images and phrases than I use). Examples of the types of images you might use include: full appointment books, the type of massage room you want to work in and the massage table you want. If you cannot find what you want in the magazines, then draw it.

Put yourself in the map. Paste a recent photo into the map to see yourself in your new massage room, counting your money, or talking on the phone to new clients. In the past I have struggled with weight issues, so I tended to include on my vision map a picture of a fabulous body with a photo of my face glued on top of the model’s.

Use color to add power to your map. Colors vividly increase the impact on your consciousness and intensify the energy. Therefore, pick colored pictures if you can.

Don’t forget the spiritual aspect. Staying within your belief system, use a symbol to indicate your connection to the infinite, such as a saint or prophet, the sun, a rainbow, Mother Nature, a blue feather—whatever triggers that connection for you. This will help you remember that you are creating afresh from an infinite source.

Money: Be sure to include some money or pictures of money on the map, so that you won’t be stuck with a lot of expenses and bills when the object of your desires appears in your life. Draw dollar signs. I always include the sweepstakes phrases that say “Congratulations, Cyd Percin, you have just won \$3,000,000.00!!!” It couldn’t hurt, and maybe it could help.

Creativity: Be as creative as you like. Make your map suit your taste. One woman who wanted a Victorian feel glued some lace, brocade ribbon and dried roses to her map. It was beautiful. I like



glitz, so I put sequins and sparkle on mine. A vision map can also be very simple, with just pictures and glue.

Affirmations: Put appropriate affirmations on your map (see the next subhead, "Affirming your power," for a description of affirmations). It is also advisable to add the following affirmation or something similar: "This or something better now manifests for me in totally satisfying and harmonious ways for the highest good of all concerned." This enables you to remain flexible while persisting toward the complete manifestation of your goals. Sometimes if we narrow our focus and think that our success can come in only one way, we do not allow the universe to give to us in unexpected and perhaps even more fulfilling ways.

Placement: I put my map on a wall near my bed. I do not hang it too high as to have it seem unattainable, or too low as to have it seem I'd already accomplished the goals. Mine is at eye level when I am lying down.

To achieve maximum results, it is important that you spend a few quiet moments looking at your map every day. The best times are just before going to bed and just after you awaken in the morning. Each time you contemplate your map you intensify the creative process. You can accelerate this process by bringing the image of your



ILLUSTRATION BY KATIE ATKINSON

map to mind during the day. Do not attempt to show how it will happen, just picture your desired results. Do not allow your images to reflect your doubts or uncertainties—trust that your vision will manifest. Group intention empowers vision maps, so I encourage you to show your completed maps to friends, family or colleagues.

When you attain or change goals, it is a good idea to destroy the old map and create a new one. The theory is that it is best to use new images for each new map and not a good idea to use any of the images from the previous map. Use new creative energy! I usually make up a ritual of burning the old one and replacing it with the new one.

Making a vision map can be a fun-filled adventure, especially if you allow your inner child to come out to play while making it.

Affirm your power

Affirmations are statements that focus attention on your power and ability to create what you want. Write your affirmations in the present tense, using positive words such as, "I am creating the life I want," rather than using negative words like "no," "never" or "none."

According to Louise Hay, renowned counselor on healing and author of the book *You Can Heal Your Life*, "Consistently used, affirmations become beliefs and will always produce results, sometimes in ways that we cannot even imagine."

There are many different theories trying to explain how and why affirmations work. The one I personally like best, though it is hard to explain, is that your subconscious mind cannot differentiate between past, present and future tenses. It always assumes that ideas and thought patterns are happening in the present tense, though in reality that may not be so. Your subconscious mind creates your world by your thought patterns. So positive affirmations trick your subconscious mind into thinking of your future goals in the present tense—and thus it begins to create that reality.

Repeat your affirmations daily. If possible, think of them throughout the day. The theory is that if you say them for 30 days consecutively, they will come to fruition.

Put them everywhere—perhaps on Post-it® notes or 3-by-5 cards. Post them on your bathroom mirror, the refrigerator, your car dashboard, kitchen cabinets and bedroom closet door. You need to see them and, more importantly, you need to say them—preferably aloud. Some people write them 10 or

Consistently used, affirmations become beliefs and will always produce results, sometimes in ways that we cannot even imagine."

20 times a day, some people chant or sing them. Do whatever feels right for you.

One woman, "Jill," told me the result of one of her affirmations. Jill wanted a new blue car, even though she did not have the money for it. So she posted affirmations about the car all over the place. Jill kept saying her affirmation, which went something like, "a new blue Mustang resides in my garage, and came to me easily and effortlessly." In about a month or so her friend was being transferred to Europe for a year and didn't have a place to store her blue Mustang—so she asked Jill if she would mind keeping it for her until she got back. Now Jill had the car of her dreams residing in her garage. We laughed and decided that if she wanted to own a car, she could include those specific words in her next set of affirmations.

Here are some examples of affirmations that I recommend for practice building:

I love what I do for a living. Money and abundance flow freely to me.

I experience my work as joyous and effective.

I attract new clients easily and effortlessly.

I am a powerful person and create my practice exactly as I want it.

My clients respect my work and refer their friends to me.

My massage practice is full and rewarding.

I make an excellent living doing what I love to do.

Regardless of the state of the economy, my practice continues to flourish.

I deserve to be successful.

In addition to any of these, I also invite you to be creative and make your own affirmations that will be appropriate for your specific situation.

Visualize your future

Creative visualizations help you create and manifest by seeing a completed picture in your mind's eye.

You need to perform creative visualization at a time when you are not going to be disturbed. Find a quiet and safe place. It is helpful if you sit or lie in a comfortable position with an open body posture, with your arms and legs uncrossed.

Begin by taking three to five long, slow, cleansing breaths. On the exhale, breathe out any negative thoughts you may have, such as, "this is a silly exercise," "this process will not work for me," or "I have a hard time visualizing and nothing will happen." Now would be a good time to stop thinking of the day's problems. Tell yourself you can revisit them at the end of the exercise, should you wish to.

Starting at your feet and moving upward, relax each part of your body. I suggest that you do this entire process slowly and deliberately. This relaxed state is the best place to begin visualizing what you want to create for yourself. After you have relaxed your entire body, you might imagine a healing pool. See yourself enter this pool to heal any negativity and barriers to getting what you want, as well as healing your body.

Then begin visualizing. Let's say you want to create an office space. Imagine your desired office in your mind's eye. Be very detailed: see the color of the walls and the type of pictures, plants, furniture and massage table. Smell the scented candles or oils. Hear the music playing. Activate all of your senses.

If you want to create more clients, visualize your appointment book filled for the week or even the next few weeks. Imagine a full waiting list as well. See your answering machine blinking with messages from clients who want to book appointments to fill your available open spaces. These are clients who love and appreciate your work and refer their friends to you. Another suggestion is to visualize your bank statement indicating that you have an abundance of money.

Massage Therapy Institute of Colorado

Presents

按摩指壓道

Japanese Massage & Bodywork Program

This is the first program offered in the U.S. to meet and exceed Japanese educational standards for Traditional Japanese massage and bodywork training. This program is directed and taught by experienced Japanese instructors who have themselves been through traditional training. This program follows the traditional Japanese methods of instruction, and is the most comprehensive program offered in the U.S. in this subject. After completion of this one year program, students will be eligible to continue with a second and third year of full-time study, for an additional 2400 hours. This program is offered at both Denver and Boulder campuses; the first program will begin in Spring 1998. Student visas are available for international students.

A One Year, 1200 hour Program

Japanese Massage and Bodywork Practicum	(Total: 600 Hours)
ANMA - Japanese Massage	200
Namikoshi Style Shiatsu	25
Keiraku Shiatsu Do	200
Japanese Facial Massage	25
Zoku Shin Do®	25
Tai Cho Ho	50
Chair Massage Techniques	75
Integrated Bodywork	25
Japanese Massage and Bodywork Theory	(Total: 100 Hours)
Clinical Study - Internship	(Total: 300 Hours)
Requirements	(Total: 200 Hours)
Anatomy and Physiology	120
General Pathology	28
Professional Ethics and Business Management	5
CPR/First Aid	7
Swedish Massage	25
Allied Modalities, Hydro and Helio Therapy	15

This program is directed and instructed by



*Shogo Mochizuki & Yoshiaki Nakano
and the finest staff from M.T.I.C.*

For information or to request a complete catalogue, contact:
Massage Therapy Institute of Colorado
1441 York Street, Suite 301 Denver, CO 80206-2127
(303) 329-6345



MTIC is approved and regulated by the Colorado Division of Private Occupational Schools, Department of Higher Education for training as a "Certified Japanese Massage Therapist."

While you are in this relaxed state you can try creating anything else that you would like to draw to you—for example, a loving relationship, a new home or an exciting vacation.

If visualization is difficult for you and no pictures are forming in your mind, continue to do this process and postulate that you are visualizing. Do not be dismayed if nothing seems to be happening—it really is. Try not to get discouraged if your manifestation takes time.

About five years ago I wanted to find a new space to do my bodywork. I was working with a chiropractor, as well as maintaining a private practice, and was using a space in her office. I had been there about 10 years, and felt it was time to move on. Although the space was lovely, it did not have an outside window and there was no visible foliage.

I used the creative visualization to find a new space. I had many parameters: It had to be in close proximity to my old office, and on the ground floor. There had to be an outside window with a garden, trees or shrubs. I needed easy access and good parking. I wanted a waiting room with windows. It had to have a healing feel about it, and I wanted it to be light and airy.

Sure enough, after seeing it in my mind's eye many times I found my perfect office. It had all of my requirements, including a large picture window that faced dense shrubbery, so that I could keep my curtains open and no one could see in. The waiting room had a window that looked out into a garden space with a picnic table set up under the trees. And it was at a price I could easily afford even though it was in a very affluent neighborhood.

You too can create your dreams through the techniques of vision maps, affirmations and creative visualizations. Be consistent, be patient and then watch them manifest. And keep at it—you're worth it! *M*

Cyd Percin, C.M.T., director of Dream On Enterprises, has been a massage practitioner for over 20 years. She has worked in resort hotels, health spas and ski resorts and has maintained successful practices in several states as well as in New Zealand. During much of that time, she has worked with chiropractors, psychotherapists and rebirthers, and has led massage workshops and business-building seminars throughout the country. She may be contacted at Dream On Enterprises, 722 Arroyo Road, Los Altos, CA 94024.

MARKETING

Resumes

Cover Letters

Practice Building

Market Trends

RESUME WORKSHEET

A] Creating your "Job Objective"

1) WHAT do I want to do?

2) FOR WHOM or WITH WHOM do I want to do it?

3) WHERE do I want to do it?

4) AT WHAT LEVEL OF RESPONSIBILITY?

MY OBJECTIVE IS:

This objective should be specific to an individual job:

Put your answers from above together to make a clear, concise statement.

Example: Massage therapist working directly with a doctor in a Chiropractic office as an assistant.

B] Writing your "Skills and Experience"

1) What are five or six (5 or 6) specific skills necessary for the above stated job objective?
(if you're not sure, interview someone who already has a job like that)

<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

2) When/where have you **used** or **learned** those skills in the past?

<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

C] Write an **"action oriented"** one-liner statement that clearly and concisely describes how you used or developed those skills.
(use your action words list to help)

SKILL: _____

One liners about my experience and accomplishments using that skill:

SKILL: _____

One liners about my experience and accomplishments using that skill:

SKILL: _____

One liners about my experience and accomplishments using that skill:

D] These skills should be used as **Qualification Highlights** in your resume.

list below 3 - 5 highlights:

Qualification Highlights may be divided into two bulleted lists on your resume:
Qualifications and Skills, use no more than five lines for each.

E] Next list your Work Experience:

Name of company, Job Title, Location of Company and Dates of Employment.

(a short job description may be added, but is not necessary if you included skills from that job in your Qualification Highlights.) Work Experience can be paid or volunteer experiences.

F] Next list your Education:

(only include degrees or certificates completed, or close to completion. If you did not obtain a degree you may list "course work included: _____" with a few job appropriate courses, do not list your entire transcript on a resume.) Do NOT include High School.

If appropriate add:

PROFESSIONAL AFFILIATIONS/MEMBERSHIPS

LICENSES

SPECIAL TITLES

NOW, put it all together in a presentation format, most word processing programs have samples or templates. Look at other resumes, and choose something you like. Be sure to include your Name, Address, Phone number and e-mail on the Resume. Always write a cover letter to present with your resume.

ACTION WORDS

ability	explain	produce
attained	feel	proficient
adept	free	proven
assist	formulate	promote
absorb	facilitate	persuade
allow	guide	progress
acts	generate	rejuvenate
alters	grow	remove
aids	help	rehabilitate
advance	heal	re-balance
balance	initiate	research
create	illuminate	rearrange
change	increase	release
conducted	impress	reduction
coach	impact	reveal
comfort	improve	relax
clarify	influence	replace
design	inform	represented
demonstrate	introduce	satisfy
develop	instrumental	shift
delay	lecture	separate
dissolve	let go	sense
dilate	maintain	soothe
disperse	move	show
directed	modify	speed
encourage	melt	skilled
examine	motivate	start
excite	magnify	successful
eliminate	managed	supervise
establish	oversee	stimulate
ease	originate	strengthened
enhance	organize	touch
evaluate	plan	transfer
express	prepared	utilize

RESUME TIPS

- ☹ Use brief phrases, not sentences; and avoid abbreviations.
- ☹ Typed on one sheet is preferable, no more than 2 pages.
- ☹ Do not include personal information that is irrelevant to the job:
like age, height, weight, marital status.
- ☹ Proofread!!! - no typographical errors, whatsoever.
- ☹ Include well organized, factual, relevant information.
- ☹ Answer the question - what makes you so special?
- ☹ Use good quality white or off white paper.

COVER LETTER

*When sending out resumes **always** include a cover letter. Be sure letter is written in appropriate business format (see samples) and should provide:*

- ☹ an introduction of your self,
- ☹ why you are writing,
- ☹ where or from whom you heard about the job,
- ☹ why YOU are the best choice for the position.
- ☹ what follow up actions will be taken.
- ☹ Thank you for your time and consideration.

Paper for resume and cover letter should match

JANIS JOHNSON

4407 Florida • San Diego, California 92116 • (619) 683-3216

MASSAGE THERAPIST

JOB OBJECTIVE

Full or Part Time position as a Massage Therapist in an acupuncture or chiropractic clinic.

PROFESSIONAL SKILLS

- Strong interpersonal and communication skills.
- Adept at creating a nurturing, relaxed climate for the client.
- Enthusiastic and energetic appreciation of clinic environment.
- Quickly able to assess and facilitate necessary treatment of clients.
- Skilled knowledge of circulatory, neuromuscular, deep tissue/muscle sculpting massage, Sheitai Shiatsu, tui na, Thai and Jin Shin Acutouch.
- Specializing in blending techniques to optimize the treatment of each client.
- Over 20 years in management of and teaching in demanding work rooms.

EDUCATION

INTERNATIONAL PROFESSIONAL SCHOOL OF BODYWORK
Massage Technician Certificate, 1993 - 120 hours
Professional Bodywork Certificate, 1995 - 150 hours
Holistic Health Practitioner Certificate, 1997 - 1,180 hours
Jin Shin Acutouch Certificate, 1996 - 90 hours

M.S., Education, 1975
Indiana University, Bloomington, Indiana

B.A., History, Theatre, 1970
Franklin College, Franklin, Indiana

RELEVANT EXPERIENCE

MASSAGE THERAPIST
Independent Contractor
Professional Massage Associates
San Diego, California
1996 to Present

100 HOURS IN CLINIC AND AT OUTSIDE EVENTS
International Professional School of Bodywork
Student Clinic
San Diego, California

ONGOING PRIVATE ECLECTIC BODYWORK PRACTICE
San Diego, California
1993 to Present

RELATED EXPERIENCE

Over 20 years as a costume director and teacher at La Jolla Playhouse and University of California, San Diego; Denver Center Theatre Company and Indiana University 1975 - 1997.

Janis Johnson, HHP
4407 Florida
San Diego, CA 92116
(619) 683-3216

July 3, 1997

Dear Sir:

I love meeting new clients and helping them discover therapeutic massage and its benefits. One of my strongest priorities and assets is developing a secure, safe environment through strong client communication and a positive, nurturing touch. My goal is to work in a clinic where these skills and commitment are valued.

My work provides a blend a various types of bodywork including trigger point therapy and deep transverse friction (neuromuscular techniques) as well as deep touch and muscle sculpting. These techniques enable me to release chronically contracted muscle tissue and fascia which will optimize and enhance chiropractic treatment.

My education at the International Professional School of Bodywork has given me a deep knowledge of anatomy and physiology. I have also studied geriatric massage and have a number of elderly clients in my private practice. My knowledge also includes a wide range of oriental and energetic body therapies: Sheitai Shiatsu, Tui Na, Thai and Jin Shin Acutouch.

The challenge of working with a diversified group of clients and problems is one I would enthusiastically embrace. I have a flexible, committed and responsible work ethic.

I am available at your convenience for an interview. I will contact your office within the next two weeks to discuss a convenient time.

Sincerely,

Janis L. Johnson

DESIGNING VISUAL PROMOTIONAL PIECES

FOCUS: To attract others and inspire them with your words. Printed media materials are follow-up and reinforce your personal presentation. They are your major promotional tools.

Start collecting descriptive materials, magazine articles, other professional's brochures and promotional flyers.

Write a detailed statement of what you do.

The information you are writing for your resume, your Self-Introduction and your Business Definition plan as well as your visual promotion pieces all communicate the same theme of who you are and what you do.

PRIMARY VISUAL PROMOTION PIECES

Business Cards

- beauty is simplicity.
- appeal to your target market.
- try to capture the essence of your practice.
- don't turn your business card into a brochure.
- no abbreviations.
- emphasize name and phone number.

Gift Certificates and Discount Coupons

- consider layout and using the paper wisely.
- select a size that easily fits standard envelopes.
- use borders and graphics to create interest.

Brochures and Promotional Flyers

- **focus on benefits**
- tell others how your service will make a difference in their well being.
- use common language; make it easy to read.
- be creative, use photos and drawings to make it attractive.
- establish credibility.

First Massage handout

- a history or brief description of massage.
- what the client received.
- what to expect as a result of the massage.

Introductory handout or flyer

- what is massage.
- what your specialty is.
- what are the benefits of your massage.
- price list.

Introduction letter

- why are you writing, who referred you.
- what type of service you provide.
- connect massage to the persons business.
- state when you will call to set an appointment to meet.

Web Site

what is your service
who will benefit
price list
how to schedule an appointment

Print Ad

what is your service
how to contact you

ALWAYS, ALWAYS, ALWAYS Include your name and telephone number on all your handouts and information. ALWAYS.

Possible Client Categories for Massage Therapy

Adults seeking stress relief and relaxation

Adults seeking massage as preventive medicine or to enhance wellness

Healthcare patients

Acute or chronic illnesses

Recovery from illness or injury

Pre- or postoperative care

Hospice care (mostly volunteer)

Recovery from trauma or abuse

Elderly adults (geriatric massage) (much is volunteer)

Pregnant Women

Infants

Children

Dancers and other performers (much is volunteer)

Athletes (sports massage)

Sports teams

Schools (mostly volunteer)

Athletic centers and health clubs

Corporate and government organizations

Chair massage for employees on-site

Massages in corporate health facilities

Animals (horses, dogs, zoo residents, pets)

MARKETING METHODS

PERSON-TO-PERSON

Word of mouth referrals

Most effective, based on relationship cultivation (inherent trust and rapport)

ASK for referral:

- *clients
- *family
- *shop owners
- *friends
- *present and former co-workers
- *other health professionals

Offer referral incentives

Networking

*Who do you know? Who do they know?

*What can you do for them? What can they do for you?

*How can you access the network of a Person of Influence?

Barter and trade

- *typists
- *hairdressers
- *graphic artists
- *acupuncturists
- *mechanics
- *graphic artists
- *tax preparers
- *massage therapists
- *teachers
- *counselors

VISUAL MARKETING

USE YOUR BUSINESS CARDS

Always carry several with you and exchange cards with others.

FLYERS AND BROCHURES

- May be distributed in combination with any marketing method as a reinforcement to your message and/or campaign

- *health food stores
- *community centers
- *airline lounges
- *hospital break rooms
- *churches
- *book stores
- *sports stores
- *theaters
- *dance studios
- *coffee houses

PROMOTIONS

Coupons

- *introductory massage special
- *2 for one
- *birthday or holiday special
- *pregnancy series
- *discount after receiving a number of massages or providing referrals

Promotional Gift Certificates

- *church raffles
- *travel clubs
- *employer holiday parties
- *pregnancy classes
- *non-profit donations
- *fitness/Tai Chi classes

Massage Parties

Direct Mail

Sending letters of introduction, announcements, speaking engagements

- Mailing list derived from database (current & prospective clients)
- May consist of purchased leads

- *medical doctors
- *exercise clubs
- *chiropractors
- *senior citizen centers
- *prospective clients
- *current & former clients
- *psychologists
- *counselors

ELECTRONIC MARKETING

- *Website/blog
- *Opt-in email promotions
- *e-Newsletters
- *Podcasts/YouTube videos and multimedia

COOPERATIVE MARKETING

- Joint promotions with other businesses
- Share expenses, distribution

- *health club
- *weight loss clinics
- *restaurant
- *tax preparer
- *beauty salon
- *maternity shops

PUBLIC SPEAKING and PRESENTATIONS

Presentations

- Describe Unique Selling Proposition, possibly to include brief demos

- *women's groups
- *birthing classes
- *specialty conventions and seminars
- *post-surgical patients
- *Toastmasters
- *business clubs
- *PTA
- *Chamber of Commerce
- *church groups

Workshop

- *Learning Annex
- *Crisis Center
- *Travel Clubs
- *hospice
- *businesses
- *health and wellness groups
- *social service agencies

Demonstrations at events

- *trade shows
- *conventions
- *health fairs
- *conferences
- *salon openings
- *holiday parties at galleries
- *craft shows

Media

Develop news release, promotional specials, send announcements,

- *radio or tv
- *special guest on health related programs

WRITING and PUBLISHING

Educate, build credibility

- *magazine / newsletter articles / blog
- *health column

Newsletter

- *client mailing list
- *rehabilitation centers
- *coaches
- *personal fitness trainers
- *health clubs
- *senior citizens centers
- *athletic teams/trainers

ADVERTISING

- Target market information with demographics and psychographics is important here to get most effective use of advertising place and money.

Considerations: Greater exposure, less specific target, greater expense
Repetition of your message, multiple exposures
Create name recognition
Be explicit in type of message you do.

Directory & catalogue listings

- *holistic health and complimentary therapy publications & directories
- *yellow pages
- *community directory
- *business directories
- *membership directories

Signs

- *T shirts, coffee/tea mugs, mouse pads, and other misc. promotional items
- *Business vehicle decals
- *Magnets
- *Store windows
- *bus, trolley, or taxi
- *license plate holder

Newspapers and other publications

- *newspaper display ad
- *church bulletins
- *theater programs
- *business publications
- *classified ads

VOLUNTEER YOUR SERVICE

OUR TOP 10 LIST:

WHAT EVERY GOOD MASSAGE THERAPY WEB SITE NEEDS

The first rule of good Web site practices? That you need to suit yourself—your business, your philosophy and your values. “We can’t apply cookie-cutter approach to everyone,” says AMTA member and Web designer Mike Reynolds. So, with that in mind, we give you our top 10 list for Web site inclusions for massage therapists:

- 1 Biography.** This is your chance to brag about yourself. Where are you from? What work do you do? Throw in a picture, if you like. (But, remember, too many pictures makes for a slow-loading Web site.) This is a good way to let people know whose hands will be on their precious body.
- 2 Frequently Asked Questions.** Do you have any questions that when you’re asked, you think, “Boy, if I had a dollar for every time I was asked that?” Then write them down. Many massage clients are bursting with questions; they’re just too shy to ask. So do it for them. Make a list of the questions you are most frequently asked, and put them on your Web site, with clear, reassuring answers. Examples? What should I expect when I come to a session? Do I have to take off my clothing? How much does it cost? Will it hurt? What happens if I have an injury?
- 3 Your Specialties, And The Services You Offer.** Go on, tell them all your specialties, and do them a favor: Explain what Hawaiian lomi lomi massage or craniosacral work is. Also, provide a short list of benefits for each.
- 4 Links.** You can create hyperlinks to other sites (including the AMTA’s site!) if you want to direct your readers to more information, but don’t want to load the articles on the Web site yourself. Or you may list the Web sites of others you work with—chiropractors, nutritionists, physicians, etc. Ask if they’ll list a link to your Web site in return.
- 5 Articles Explaining The Details Of Your Work.** Are you a budding writer? Write your heart out! But try to keep your writing clear and straightforward (not too many technical terms!) And save your most verbose pieces for back pages. You don’t want to scare visitors from your home page by making it too copy-dense.
- 6 Contact Information.** Try to have this on every page. Nothing’s more frustrating than wanting to make an appointment, and not being able to find a phone number.
- 7 Pay Schedule.** List the different lengths of sessions, and how much each costs. Also, you may want to include series discount information, seasonal specials and other special offers.
- 8 Directions.** A map wouldn’t hurt, either.
- 9 Logo.** Have you always wanted to have a logo that identifies you and your business? Here’s your chance. Try to include this logo at the top of each page, and cross-reference it on your brochures, pamphlets, signs and business cards.
- 10 Mailing List.** Include a form where visitors to your Web site can enter their name, address, phone number and E-mail address. You can call them later to discuss their questions or interests, or place them on your snail-mail, or E-mailed newsletter or mailing list.

2005 Massage Therapy Industry Fact Sheet

The following is a compilation of data gathered from U.S. government statistics, surveys of consumers and massage therapists and recent clinical studies on the efficacy of massage.

These data provide an overview of the current state of the massage therapy profession, public and medical acceptance of the value of massage and increasing consumer usage of massage therapy.



Massage Therapy As A Profession Is On The Rise

- In 2005, massage therapy was projected to be a \$6 to \$11 billion a year industry.¹
- It is estimated that there are 250,000 to 300,000 massage therapists and massage school students in the United States.²
- According to the U.S. Department of Labor in 2002, employment opportunities for massage therapists were expected to grow at a faster than average rate. Through 2012, massage therapists are likely to see a 20 percent to 35 percent (21% to 35%) increase in job opportunities.³
- Between August 2004 and July 2005, approximately 47 million American adults received a massage – 2 million more than in the previous year.⁴

Who Is Today's Massage Therapist?

Today's Massage Therapists are...⁵

- Likely to enter the massage therapy profession as a second career.
- Predominantly female (83%).
- In their mid-40s, on average.
- Most likely to be members of a professional organization.
- Most likely to be sole practitioners.
- Working an average of 15 hours a week providing massage. (Excluding time spent on other business tasks such as billing, bookkeeping, supplies, maintaining equipment, marketing, scheduling, etc.)
- Earning approximately half of their income (49%) from practicing massage therapy.

- Charge an average of \$58 for one hour of massage.
- Earning an average wage of \$39 an hour (including tip) for all massage related work.
- Giving an average of 38 massages per month.
- Working in the industry on average for 7.8 years.
- Likely to provide massage therapy in a number of settings, including their own place of practice, a client's home, a healthcare setting, or an on-site workplace.
- Seventy-eight percent (78%) of massage therapists provide Swedish massage, followed by 70 percent who provide deep tissue massage, 41 percent trigger point, and 37 percent sports massage.

Massage Therapy Provides A Rewarding And Flexible Career

Massage therapists earn a comparable annual income when compared to other healthcare support workers, according to the U.S. Department of Labor Statistics.⁶

- The average annual income for a massage therapist (including tips) who provides 15 hours of massage per week is \$29,250, compared to \$26,210 for full-time physical therapist aides; \$28,140 for full-time physicians' office workers, \$34,780 for full-time recreational therapists, and \$26,610 for other full-time healthcare support workers.⁷

While massage therapists practice in a variety of work environments, sole practitioners and independent contractors account for the largest percentage of practicing massage therapists.⁸

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- Sole practitioners or partners in their own business account for 72 percent of respondents.

Massage therapists overwhelmingly indicate that they chose massage therapy as a second career, providing them with a flexible schedule and additional income.

- Eighty-three percent (83%) started practicing massage therapy as a second career.
- The average hours per week a massage therapist practices massage is 15.38 for providing actual massage. This does not include additional hours spent on billing, scheduling, marketing, etc.
- Fifty-five percent (55%) of massage therapists say they would not want to work more hours providing massage than they do presently.
- Many massage therapists surveyed work in complementary fields such as teaching massage (23%) or providing other forms of healthcare (26%).

Education Is Highly Valued In The Massage Therapy Profession

In recent years, the massage therapy profession has introduced accreditation programs to enhance the profession's reputation and ensure that consumers can find massage therapists who have been trained in programs that meet high educational standards.

- Organizations such as the Commission on Massage Therapy Accreditation (COMTA), which has been recognized by the U.S. Department of Education, work with massage therapy schools and programs to ensure that their educational standards demonstrate quality, performance and integrity of higher learning.
- There are more than 70 COMTA-accredited massage therapy institutions and programs in the United States, and many other massage training programs accredited by other organizations.⁹

Professional affiliations and certification programs provide massage therapists with vital opportunities for continuing their education and improving their skills.

- Today, there are more than 80,000 Nationally Certified massage therapy practitioners. To become Nationally Certified, a massage therapist must possess certain levels of education, experience and training, demonstrate mastery of core skills, abilities and knowledge, and pass a certification exam.¹⁰
- Ninety-two percent (92%) of massage therapists strongly or somewhat agree there should be minimum education standards for massage therapists.¹¹
- A majority of massage therapists (89%) have taken continuing education classes.
- The average number of hours spent in continuing education is 27 per year.

- The most popular choices for continuing education are advanced training for specific modalities, training for new modalities/ techniques, and massage for specific populations (i.e. pregnant women, geriatric, and athletes.).

State Regulation Of The Massage Profession Rapidly Growing

Currently, 36 states and the District of Columbia regulate massage therapists. In 1995, only 20 states and the District of Columbia regulated the massage therapy profession.¹²

- Though each state law is different and has different requirements, in most cases, only those individuals who have the state designation may provide massage for pay and/or use a title indicating that person is a massage therapist. In states that do not regulate or license massage therapists, this task often falls to local municipalities.

Who Gets Massage, Where And Why?

According to AMTA's 2005 Consumer Survey, 34 percent of adult Americans received a massage within the past five years.¹³

- Seventeen percent (17%) of men had a massage in the past 12 months, up from fourteen percent (14%) last year. Twenty-eight percent (28%) received a massage in the past five years, up from twenty-three percent (23%) last year.
- In comparison, the rate for women who received massage in the past five years remained consistently high at 40 percent for the past two years.
- Seventy-three percent (73%) of people who have had a massage would recommend massage therapy to someone else.

Americans most often choose to get a massage for medical reasons, relaxation and stress relief.¹⁴

- Thirty-two percent (32%) of adult Americans who received a massage in the past 5 years did so for medical purposes, such as for muscle soreness and spasm, injury recovery and rehabilitation, and pain relief.
- Twenty-six percent (26%) of consumers who had a massage in the past 5 years cited relaxation and stress relief as the main reason for getting a massage.
- Additionally, 26 percent of Americans who received a massage in the past 5 years did so because it was a gift or it was free.

A majority of people in the same survey said they preferred to receive a massage in a spa or in a massage therapist's place of business.

- The majority of consumers indicated that they would prefer to receive a massage in a place of business such as a spa (27%) or at massage therapist's location (24%) while 30 percent would prefer receiving a massage at home or the home of someone they know.

- Most Americans received their last massage at a spa (20%), 18 percent at their massage therapist's location, and 13 percent at home or in the home of someone they know.
- Almost all spas in the U.S. (94%) have a massage therapist on staff.¹⁵

Massage Therapy In The Workplace

Employers and employees recognize the benefits of massage therapy in the workplace.¹⁶

- Massage therapy has been shown to be effective in reducing stress and managing/relieving pain.
- Many companies have seen that massage therapy has increased productivity and reduced stress.

There are many ways in which American companies incorporate massage therapy into the workplace.¹⁷

- Massage therapists as full- or part-time employees.
- Individual contractors.
- Employee wellness centers.
- Cost-sharing for massage therapy sessions with employees.

Research has shown that massage therapy benefits employees in the workplace.¹⁸

- A study by the Touch Research Institute at the University of Miami found that after five weeks, a group of 26 employees who had twice-weekly, 15-minute massages in the office fared better than a control group of 24 employees who were just told to close their eyes and relax. The massaged group experienced reduced stress and improved performance, while the control group did not.

Top companies offer massage therapy in the workplace.

- Among the companies identified as the "100 Best for Working Mothers," 77% offered massage therapy to their employees.¹⁹
- Eighteen percent (18%) of corporations with more than 500 employees offered massage therapy to their employees versus 11% of companies nationwide of all sizes that were surveyed.²⁰
- Companies offering massage therapy as an employee benefit include Allstate, Best Buy, Cisco Systems, FedEx, Gannett (USA Today), General Electric, Hewlett-Packard, Home Depot, JC Penney, Kimberly-Clark, Texas Instruments and Yahoo!²¹
- S.C. Johnson says that more and more managers recognize the benefits of massage for their employees – and the company's been offering massage therapy as a benefit for more than 10 years.²²

Massage And Healthcare

Healthcare providers are increasingly promoting the benefits of massage to their patients.

- According to AMTA's 2005 Consumer Survey, 21 percent of American adults indicated that they discussed massage therapy with their doctor or other healthcare provider, up from 14 percent in 2002.
- Of those people who discussed massage therapy with their healthcare provider, when asked who recommended massage therapy to them, 60 percent of adult Americans said a physician, followed by a physical therapist (50%) and a chiropractor (38%).²³
- The majority of massage therapists (70%) indicate they receive referrals from healthcare professionals, averaging two referrals per month.²⁴
- Eighty-two percent (82%) of hospitals offering CAM (complementary and alternative medicine) therapies include massage therapy among their healthcare offerings.²⁵
- Of those hospitals, 70 percent utilize massage therapy for pain management and pain relief.²⁶
- Sixty-eight percent (68%) of American adults would like their health insurance providers to cover massage therapy.²⁷
- Seventy-four percent (74%) of HMO plans cover massage/relaxation therapy in some way.²⁸

The therapeutic benefits of massage continue to be researched and studied, with several recent clinical studies, sponsored by The National Center for Complementary and Alternative Medicine.²⁹

- Massage therapy for cancer-related fatigue.
- The effect of massage therapy on depression, quality of life and plasma cortisol levels in subjects with advanced HIV disease.
- Massage therapy's effectiveness in reducing pain and improving quality of life among cancer patients at life's end.
- Massage therapy's effectiveness in helping pre-term infants show greater daily weight gain and are discharged earlier from the hospital.
- The effects of in-home, family-administered massage and in-home relaxation training on measures of physical status and healthcare utilization in a sample of African-American adolescents age 15 years and older and adults with chronic pain associated with sickle cell disease.

The health benefits of massage therapy have begun to be studied in depth, with recent studies associating massage with substantive improvement of symptoms in cancer patients:³⁰

- Following massage therapy, 50 percent of surveyed cancer patients reported a reduction in symptoms of pain, fatigue, stress, anxiety, nausea, and depression.
- Surprisingly, even patients who reported a high baseline level of symptom severity pre-massage therapy reported significant improvement with massage.
- During the 48-hour follow up period, 100 percent of patients' symptoms stayed below baseline level.

Massage therapy has been shown to be effective in:

- Soothing chronic back pain better than other complementary therapies.³¹
- Boosting the body's immune system functioning.³²
- Decreasing the symptoms of carpal tunnel syndrome.³³
- Reducing anxiety and lowering blood pressure in stroke patients.³⁴
- Easing post-operative pain.³⁵
- Reducing headache frequency.³⁶
- Easing alcohol withdrawal symptoms.³⁷
- Decreasing pain and anxiety in hospitalized cancer patients.³⁸

The American Massage Therapy Association (AMTA) is a non-profit, professional association with more than 54,000 members throughout the United States and in some 27 countries. The association is directed by a volunteer Board of Directors chosen through its national election and encourages members to participate through its 52 chapters.

The American Massage Therapy Association provides information about massage therapy to the public. The association also helps consumers and healthcare professionals locate qualified massage therapists nationwide, through AMTA's Find a Massage Therapist® national locator service. The free national locator service is available via AMTA's website at www.amtamassage.org and toll-free at 888-843-2682 [888-THE-AMTA].

¹ Centers for Medicare & Medicaid Services. *2004 National Health Expenditure Projections 2004-2014*. Barnes P, Powell-Griner E, McFann K, Nahin R. *CDC Advance Data Report #343*. Complementary and Alternative Medicine Use Among Adults: United States, 2002. May 27, 2004.

² From data compiled by AMTA 2005.

³ U.S. Department of Labor, Bureau of Labor Statistics, 2004-2005 Occupational Outlook Handbook.

⁴ AMTA 2005 Consumer Survey.

⁵ AMTA 2005 Industry Survey.

⁶ Based on a comparison of results of an AMTA 2005 Industry Survey and U.S. Department of Labor, Bureau of Labor Statistics data.

⁷ U.S. Department of Labor, Bureau of Labor Statistics. November 2004. *National Occupational Employment and Wage Estimates*.

⁸ AMTA 2005 Industry Survey.

⁹ The Commission on Massage Therapy Accreditation. November 2005.

¹⁰ National Certification Board for Therapeutic Massage and Bodywork. *Consumers' Guide to Therapeutic Massage & Bodywork*.

¹¹ AMTA 2005 Industry Survey.

¹² American Massage Therapy Association (AMTA).

¹³ AMTA 2005 Consumer Survey.

¹⁴ *ibid*

¹⁵ International Spa Association, 2004 Industry Survey.

¹⁶ Ives, Jean. "Massage is in Business." *Massage Therapy Journal*. Winter 2004.

¹⁷ *ibid*

¹⁸ Touch Research Institute at the University of Miami.

¹⁹ Ives, Jean. "Massage is in Business." *Massage Therapy Journal*. Winter 2004.

²⁰ *ibid*

²¹ *ibid*

²² *ibid*

²³ AMTA 2005 Consumer Survey.

²⁴ AMTA 2005 Industry Survey.

²⁵ National Survey conducted by the Health Forum/American Hospital Association 2003.

²⁶ *ibid*

²⁷ AMTA 2005 Consumer Survey.

²⁸ America's Health Insurance Plans, 2002 AHIP Survey of Health Insurance Plans.

²⁹ The National Institutes of Health, Web site: www.clinicaltrials.gov

³⁰ Sloan-Kettering Cancer Center. August 2004.

³¹ Preyde, M. Effectiveness of Massage Therapy for Subacute Low-back Pain: A Randomized Controlled Trial. *CMAJ*. 162(13):1815-20; Jn 27, 2000.

³² Field, T., Hernandez-Reif, M., Ironson, G. Massage Therapy Effects on Breast Cancer. (*unpublished*); 1998. Ironson, G., Field, T., et.al. Massage Therapy is Associated with Enhancement of the Immune System's Cytotoxic Capacity. *Intern. J. Neuroscience*. 84:205-217; 1996. Zeitlin, D., et.al. Immunological Effects of Massage Therapy During Academic Stress. *Psychosomatic Medicine*. 62:83-87; Jan/Feb 2000.

³³ *Journal of Bodywork and Movement Therapies*. 2004.

³⁴ *Complementary Therapies in Nursing & Midwifery*. 2004, Vol. 10, pp. 209-216.

³⁵ *Pain Management Nursing*. June 2004, Vol. 5, No. 2. pp.59-65.

³⁶ *American Journal of Public Health*. October 2002.

³⁷ *The Journal of Alternative and Complementary Medicine*. April 2005, Vol. 11, No. 2. pp. 311-313.

³⁸ *Journal of Nursing Scholarship*, 2002, Vol. 34, No. 3.

AMTA Member Demographics

The American Massage Therapy Association® (AMTA®) experienced a dramatic increase in membership between 1990 and 2002.

*AMTA Membership
March 1990 – 12,000*

*AMTA Membership
March 2002 – 46,000*

Who are AMTA Members?

Gender*

AMTA's membership is predominantly female — 84% are female and 16% are male.

Age*

57% of AMTA members are between the ages of 35 and 54.

- 32% are under age 35
- 28% are age 35-44
- 29% are age 45-54
- 11% are age 55 or over

Education

43% of AMTA members have received at least a bachelor's degree and 45% have attended some college.

Practice Area Population

- 37% of AMTA members primarily practice in a town or city of 10,000 to 99,999 people
- 18% practice in a city of 100,000 to 499,999 people
- 16% practice in city of more than 1 million people
- 12% practice in a city of 500,000 to 1 million people
- 11% practice in a town of less than 10,000 people
- 6% practice in a rural area.

How do AMTA Members Describe Their Massage Practices?

Practice Time

47% of AMTA members describe their practice as full-time

53% describe their practice as part-time

Note: Full-time, as defined by members, involves 17 or more hours of actual massage per week. Additional time is spent on practice management, billing, marketing, etc.

Preferences for Work Hours

- 47% of AMTA members would like to increase their work hours
- 12% would like to decrease their work hours
- 42% would prefer not to change their work hours.

Practice Type*

- 66% Sole practitioner with own business
- 18% Self-employed contractor
- 16% Employee

Massage Approaches & Techniques

AMTA members utilize a variety of massage approaches and techniques.

Percentage of member therapists who reported using the following:

- 92% Swedish
- 76% Deep Tissue
- 58% Neuromuscular
- 58% Trigger Point
- 49% Sports
- 36% Shiatsu-Acupressure

Practice Settings*

Massage therapists practice in a variety of settings and locations, and in a variety of contractual arrangements. A therapist may practice at several different sites and/or settings in a single day.

- 43% Travel to Client Locations
- 33% Home-based office
- 16% Office with other massage therapists
- 30% Private Practice Solo Office
- 19% In a medical setting/office



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- 22% In a spa or salon
- 15% Other
- 7% In a health club

Full-Time Earnings

The median full-time massage income of AMTA members is \$20,000 - \$29,000 per year. 43% earn more than \$30,000 annually from their work as massage therapists.

Part-Time Earnings

The median part-time massage income of AMTA members is under \$4,000 per year.

24% earn \$10,000 or more annually from their work as massage therapists.

What do AMTA Members Charge for a Massage?

Most Commonly Charged Fees

A wide variety of conditions impact fees charged by members. Regional and local markets, practice settings, and advanced training influence the amount a therapist charges for a full-body table massage session. Shown below are AMTA Member average fees based on session length and session location – at the therapist’s office or at the client’s location.

Session Length	Therapist’s Office	Client’s Location
15 minutes	\$16	\$16
30 minutes	\$28	\$33
60 minutes	\$48	\$61
90 minutes	\$69	\$84

How do AMTA Members View their Profession?

Attitude Toward Their Profession

- 98% of AMTA members agree that massage is becoming more accepted in the U.S
- 89% of AMTA members agree that massage is becoming more accepted by medical doctors, 6% disagree and 5% have no opinion.
- 82% of AMTA members agree that, in the future, healthcare will incorporate massage therapy more into medical care, 6% disagree and 12% have no opinion.

Satisfaction With Their Profession

AMTA members are very satisfied with being part of the massage therapy profession. On a five-point scale, with “5” being extremely satisfied, 88% of AMTA members rated themselves as very or extremely satisfied with being a massage therapist — a clear indication that AMTA members are enthusiastic about their chosen profession.

- 76% of AMTA members are satisfied with their career as massage therapists.
- 24% of AMTA members are not satisfied with their career as massage therapists.

AMTA Member Business Practices & Equipment

Business Practices

AMTA members use a variety of methods to promote and build their practices.

- 94% Use printed business cards
- 51% Use printed brochures
- 47% Display their credentials
- 40% Advertise in the yellow pages
- 35% Use display signage
- 24% Advertise in local publications
- 21% Speak at meetings, health fairs, etc.

Office Hardware

- 78% of AMTA members have a computer
- 44% percent have a dedicated telephone line for a computer
- 44% of AMTA members use a computer daily
- 65% use a computer weekly
- 74% of computer users have a printer – 61% of them use it on a weekly basis
- 54% of AMTA members have a fax machine – 26% use it at least once a week, and 20% use it seldom

*Data in this publication is based on AMTA member surveys. Most data through 2001, * indicates data from 2002*

The American Massage Therapy Association represents more than 46,000 massage therapists. AMTA works to establish massage therapy as integral to the maintenance of good health and complementary to other therapeutic processes. To advance the profession, AMTA promotes ethics and standards, supports National Certification and massage school accreditation, requires continuing education, offers professional publications, engages in legislative efforts & public education, and fosters the development of its members.

- AMTA has more than 46,000 members in 27 countries.
- AMTA has chapters in all 50 states, the District of Columbia, and the U.S. Virgin Islands.
- AMTA is governed by an elected National Board of Directors.
- AMTA was founded in 1943.

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On Sept. 19, 2005, ABMP sent out 1,497 invitations asking members to participate in our biennial survey. We received 353 responses — a participation rate of 23.6 percent. Following is a summary of the survey results, with some comparison information included from the 2003 and 2001 surveys.

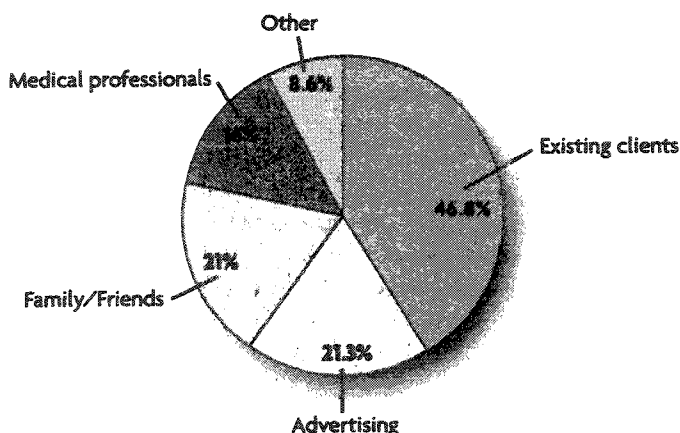
When practitioners were asked which technique was the primary focus of their work, Swedish massage was the most prominently practiced, with 37 percent indicating so. However, this is a step back from 2003, when 42 percent reported Swedish as their primary focus. By comparison, deep tissue/neuromuscular therapy practice rose from 24 percent in 2003 to 34 percent in 2005. It was followed by “other” (11.6 percent), myofascial therapy (6.4 percent), energy work (3.7 percent), and sports massage (3.1 percent).

When asked what other techniques they practiced, practitioners also said Swedish was the most prominent modality with 56.9 percent, followed by deep tissue/neuromuscular therapy at 53 percent, reflexology at 45.6 percent, sports at 41.4 percent, on-site at 41.4 percent, and energy healing at 39.4 percent.

Contact hours remained largely the same as 2003; average combined hours from sessions performed during the week prior to the survey dropped from 16.3 to 15.4, but the median remained 13. The predominant locale remains the practitioner’s office, with 40.4 percent of massages delivered there; 11.5 percent of massages were delivered in practitioners’ homes, while 6.5 percent were delivered at clients’ homes. Other relevant locations were day spas (12.8 percent), chiropractic offices (10.7 percent), and hospitals (4 percent). Not surprisingly, 49.6 percent of therapists said they spent their professional time in one location, 30.3 percent at two locations, and 10.8 percent at three locations.

One-third of respondents said they work in a spa (this is down from 2003, when 41.8 percent reported working in a spa) and are largely classified as independent practitioners who are paid only for their massage time. Half of practitioners are paid a flat rate and half are paid a percentage of the total spa fee. In addition, 63 percent of practitioners report receiving tips.

Sources of Clients for Massage Therapists



Another one-third of practitioners said they work in a medical setting, primarily in chiropractic offices (33.6 percent), wellness clinics (26.5 percent), physician offices (6.2 percent), and physical therapy offices (5.3 percent). Like those in a spa setting, most are paid only for their massage time (79.2 percent) rather than all hours worked. However, more are paid a flat rate in a medical setting (61.7 percent) but received less tips than spa employees (only 40 percent do).

When it comes to receiving third-party insurance reimbursement, only 18 percent of practitioners do so.

Overall, a typical massage or bodywork session lasts 60 minutes, and therapists receive \$60 on average for their work.

Member Snapshot

More than half of ABMP massage therapists are married (57 percent) and most are female (78.8 percent), with average tenure in the field at 5.6 years. Though school owners tell us the average enrollment age into massage therapy training is trending younger, our survey shows the average age of the practicing bodyworker is still over 40.

The number of members who report having a college degree continues to rise, though only marginally (55.5 percent versus 55.3 percent in 2003 and 54.5 percent in 2001). More than one in four have a bachelor’s degree, and 9.6 percent have a master’s degree or higher.

Income for the first year of practice continues to trend upward, with an average of \$9,588 (up from \$9,279 in 2003) and median of \$7,750 (up from \$6,000 in 2003). And average income is once again showing growth after a decrease between 2001 and 2003, with respondents reporting \$18,950 (up from \$17,702 in 2003) and a median of \$14,500 (up from \$13,000 in 2003). Nearly half of the respondents report supplementing their income with another job (45.2 percent), a job at which they spend an average of 25 hours per week. The top five second occupations include: office/secretary/clerks, sales/retail, teacher/education, massage instructor, and esthetician/skin care professional.

By contrast, total earnings shrunk (average dropped 2.6 percent to \$32,506), as did household income (-7.3 percent, on average \$60,397).

ABMP members continue to show interest in pursuing continuing education. Following are the areas that interest them the most, in descending order: energy work, craniosacral therapy, medical massage, myofascial therapy, and neuromuscular therapy.

Perhaps the most telling statistic gleaned from the survey was members’ feelings regarding the size of their practice. More than two-thirds (68 percent) wish they had more clients. This sentiment was echoed later when they were asked what would they change if they could change one thing — 24 percent indicated they would like more clients. Members also mentioned they would like to improve their current workspace (13.3 percent), own their practice or workspace (9 percent), and/or move to a new location (7.5 percent).

Increasingly, more members have taken the National Certification Examination for Therapeutic Massage and Bodywork (NCETMB) during the past four years — 35.2

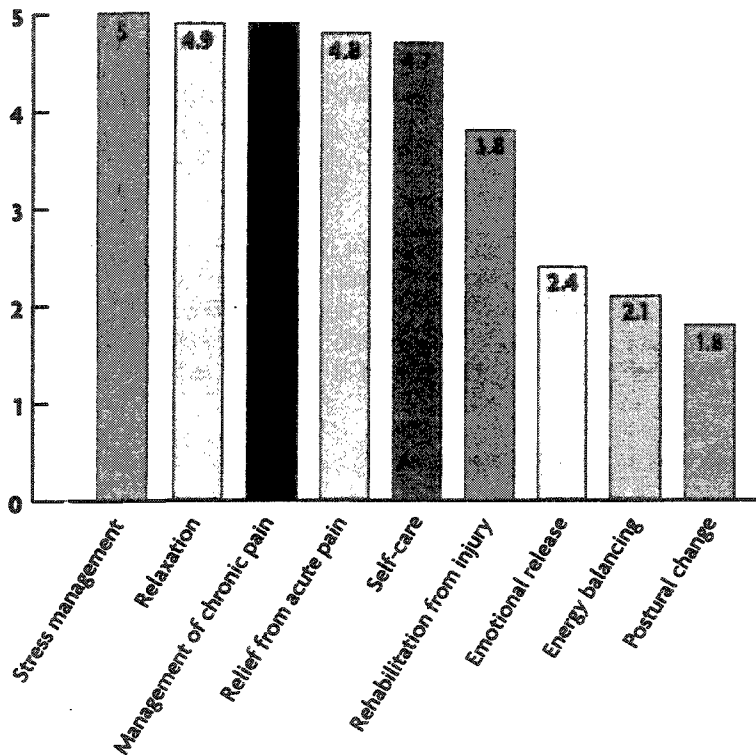
percent in 2005 versus 31.4 percent in 2003 and 20 percent in 2001. Of those who took the exam, 55.6 percent did so because it was requirement to practice in their state. While a majority of members said the price for state credentialing was reasonable (63.2 percent), nearly two-thirds said the cost of the NCETMB was excessive.

Practice-Building Strategies

The association's most readily available tool for such activities, Abmp.com, got good marks. Four out of five respondents (80.5 percent) had visited Abmp.com this year, up from 64.3 percent in 2003 and 29.6 percent in 2001. Abmp.com receives an average of 18,000 unique visitors and 2.2 million hits each month. By contrast, Massagetherapy.com receives 27,000 unique visits and 1.3 million hits each month.

On the other hand, members still aren't taking advantage of many of ABMP's services, such as the Web community. Only one in six members had enrolled and very few were taking advantage of the free e-mail account and the ability to build their own website.


Why Clients Seek Massage Therapy



But those who have used the marketing materials seemed very pleased. For instance, the online newsletter was well received by a small audience (12.7 percent have created one), but nearly 9 in 10 would utilize it again.

Other practice-building strategies that members use include: brochures/fliers (59 percent), networking (52.3 percent), community service (45.1 percent), Yellow Pages (26.3 percent), personal website (19.1 percent), Internet posting (16.5 percent), and newsletters (15.6 percent), among others.

The top five most popular member benefits include: MassageFinder, article database on Abmp.com, photo library/CD, Web community, and Cell Charge credit card processing.

If you have any questions about the survey results, including how to access and use many of ABMP's benefits, please contact us at 800/458-2267 or expectmore@abmp.com, or visit us at www.abmp.com. 

Different Strokes

Your ABMP Touch Community

For questions or comments,
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Getting Your Clients to Rebook

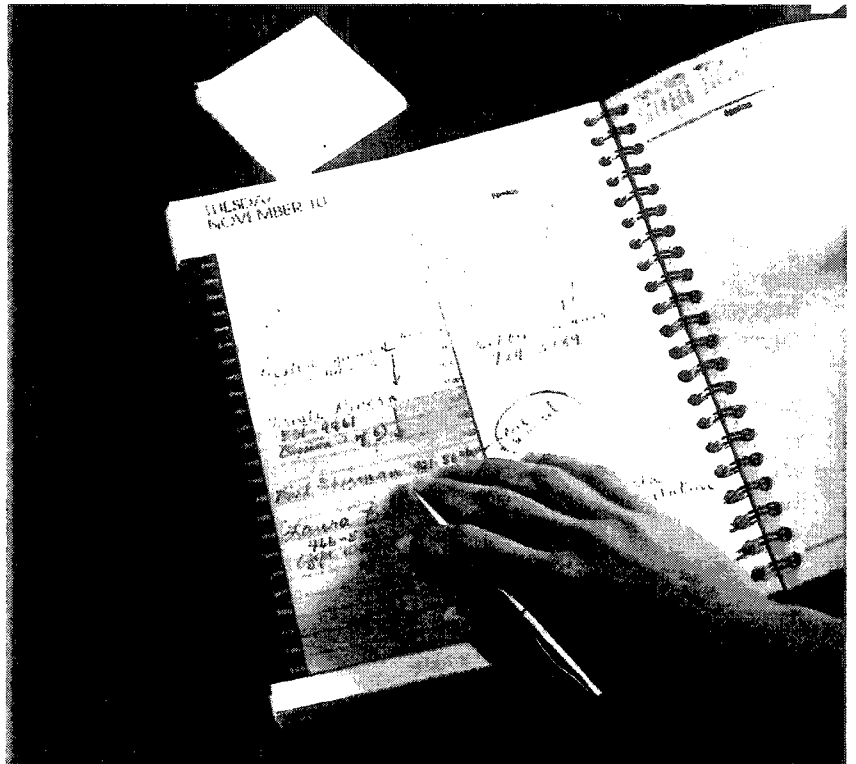
by Felicia Brown, L.M.T.

Whether in practice for years or just getting started, many massage therapists periodically find themselves with too many open appointment times. While free time has its advantages and can often be used productively, an empty table often means an empty bank account. But how do you keep your appointment book full on a regular basis?

The easiest and most effective way I have found to keep my schedule not just full but overflowing is by consistently rebooking existing clients, rather than merely bringing in a steady flow of new clients. Clearly, the best time to get a client to schedule another appointment with you is while they are still in your office. They have just experienced your wonderful work and are sure to be enthusiastic about coming back. Not only that, but you are face-to-face and able to discuss all the appointment possibilities in person rather than through voice mail or answering machines.

If you always leave it to the client to call when they are ready to make another appointment, you run the great risk of the client never making that call. Other things will come up; their time will be devoted to other things; they will forget how important massage is for them. As a result, you will probably end up with a few more holes in your schedule.

Here are several pointers on how to make sure the majority of your clients reschedule, hopefully before they walk out the door:



1. Educate clients

Explain the benefits of your service. This is especially important if a client is new or if this is his or her first exposure to massage. Make sure to educate clients on the normal number of visits or what you think is an acceptable amount of time between appointments. Remind them of the importance of taking care of themselves, both physically and mentally, and how massage therapy is a vital part of that care. I often explain that massage therapy is not only a luxury, but is also a necessity—just like regular oil changes and maintenance are for your car.

2. Get regular massage

I also set an example by getting a massage at least once a week (which I am happy to tell clients when they ask about the normal frequency of visits). It's been a real boost to my sales to be able to make that statement. After all, how can you expect clients to come in that often if you aren't taking care of yourself just as well? Getting a massage every week allows me the advantage of mentioning all the ways massage has personally benefited me.

November/December 1998

Massage Magazine

schedules, as well as clients you just couldn't fit into your busy day. When you have cancellations and other unexpected changes in your schedule, give these people a call. Very often you will be able to re-fill those empty blocks of time. Most people will appreciate your efforts even if they can't make it in and will often schedule for another time while you have them on the phone.

I also periodically touch base with clients I haven't heard from or seen lately. Here again, many of the people who have received a "check-in" call from me thank me for staying in touch. Many clients have gotten busy and let massage fall to the bottom of their priorities. A simple phone call reminded them not only of how important massage is to them, but also how important their continued health, welfare and patronage is to me.

It takes a lot of hard work and perseverance to build and keep a clientele. And no matter what you do, there will still be times when your table is empty. Even the most talented therapists in the world will occasionally have a slow day. However, if you strive to do your best hands-on work and to follow through with each client in the ways suggested here, you are bound to become and stay as busy as you want to be. *M*

Felicia Brown, L.M.T., owns a group massage therapy practice and day spa in Greensboro, North Carolina. She is also the editor/publisher of Beyond Bodywork: A guide to business and marketing for massage therapists and other business professionals, and is available for lectures, workshops and private consultations. She may be reached at Balance, 823 N. Elm St., Greensboro, NC 27401, or via e-mail: FBrown6886@aol.com



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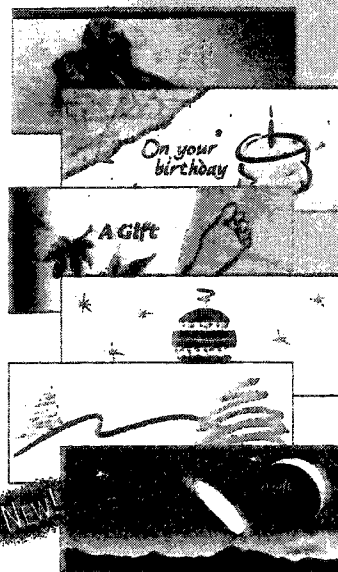
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Use your own creativity to come up with ideas on encouraging your clients to get massage regularly. Be sure, however, that whatever ideas you follow through on provide adequate compensation for your time and effort.

around their needs. If appropriate, tell them about any discounts or specials that you offer.

4. Accommodate clients' schedules

Once you determine that a client is interested in receiving massage on a regular basis, suggest setting up a standing appointment. Let the client know how busy you are becoming and how you would hate to inadvertently give away a preferred appointment time because the client forgot to schedule in advance.

This will not only give you some "bread and butter" appointments, but will make your clients feel special knowing that you want to make them a priority. Work together to select a regular weekly or monthly time, and then block out that time for the client indefinitely. Be sure to explain your policy for cancellations and schedule changes if you haven't already. And if you find at a later time that the chosen time is not working for some reason, talk to your client about finding another time slot or going back to scheduling individual appointments.

5. Offer incentives

Some therapists, especially those just beginning their practice, may also want to consider adding some type of frequency discount or bonus for their regular clients. I offer a discount of \$10 per massage (to clients who ask) on 10 or more prepaid sessions. I have also seen punch cards that are stamped each time a client comes in for an appointment. When the card is full, the client receives a free session or some other type of thank-you gift.

Use your own creativity to come up with ideas on encouraging your clients to get massage regularly. Be sure, however, that whatever ideas you follow through on provide adequate compensation for your time and effort.

6. Reach out regularly

Offer to call clients later to make an appointment. Some people just don't know their schedule in advance. Others aren't ready to make another appointment immediately, even if they want to come back. Find out a good time to reach them, and then write it on your calendar. Be sure to follow up on the day you said you would call and have a few viable appointment times in mind. I keep a call list every day, both for setting and confirming appointments.

There are some people I call every single week to schedule or remind them of their next visit. It is surprising how many clients have thanked me for this simple service. Many people have said that if I didn't call them they would never remember to make massage appointments. However, also be aware that some people will not appreciate this type of service and would rather call you to reschedule. You'll have to ask each client about this.

Also keep a cancellation list made up of people who can't schedule in advance and people who have a degree of flexibility in their

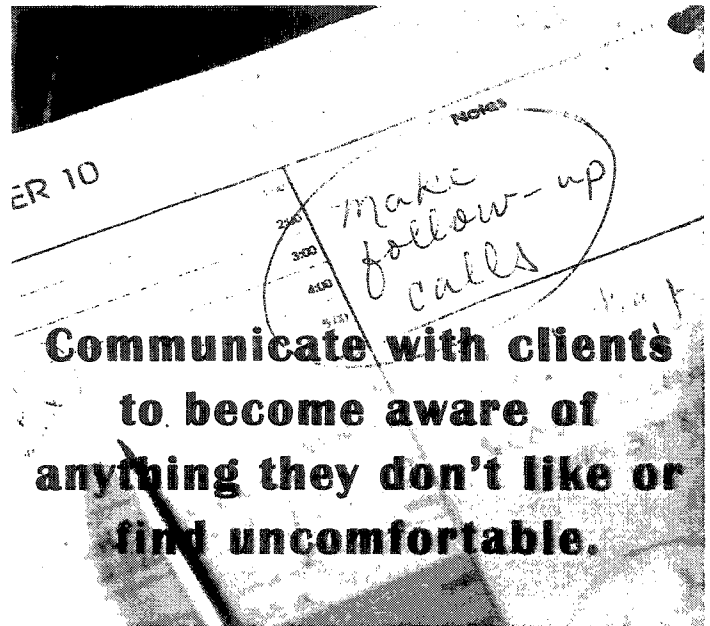
Clients will put a lot of faith in what you tell them about massage, especially if you have experienced it firsthand. And receiving bodywork on such a regular basis keeps my work fresh and new. It makes me remember how great massage can be and keeps me enthusiastic about doing (and selling) it. Remember, you are the "expert" in the room, and your clients will listen to your professional opinion.

3. Identify client needs

Find out why each client is there and then devise a treatment plan or schedule to fit the individual. If someone is an out-of-town visitor or a one-time "special occasion appointment," you may not ever see them again. However, if this person is in need of pain relief due to an injury, you will probably need to see him or her several times to clear up the problem. Once you decide what is needed, discuss your plan with the client.

Many of your clients will have more than one reason for wanting massage (pain relief, pampering, relaxation, personal contact). Be sure to find out what is most important to each of them—then give your clients what they want. Don't get caught up in your own agenda or idea of what your client needs. (I can't tell you how many times I have gotten a massage from a competent therapist who ignored my specifically requested needs to work on the areas the therapist thought were important. How very disappointing and frustrating that was for me!) Remember, the client is purchasing your time. Be sure to use it wisely.

Also be sure to check in with every client, every session. Communicate with them to become aware of anything they don't like or find uncomfortable. Let them know it is OK to ask for what



Communicate with clients to become aware of anything they don't like or find uncomfortable.

they want. And don't assume that your regulars just want "the usual" every time. Find out if they have any new injuries or problems since you last saw them. Ask them if they want specific work on those troubled spots instead of a full-body massage, especially if they seem to be in acute pain. Also ask if it is OK to run overtime, especially if they are business people or busy moms.

It is also very valuable to discuss each person's individual scheduling needs and flexibility, as well any financial concerns that they may have about receiving massage or bodywork treatments. Make notes if you need to and let them know how you are able to work

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A Sample Month-By-Month Massage Therapy Marketing Plan

JANUARY

- Bimonthly newsletter, including healthy approaches to New Year's Resolutions.
- Happy New Year cards, with 10 percent discounts for referring a friend.
- Call two past clients, and offer a "resolutions" special.
- Volunteer at a local event—indoor triathlon, skating competition, or local open house for a health club, for example.

APRIL

- Place an ad with your local YMCA or YWCA. Most have newsletters and bulletin boards.
- Invite three other massage therapists in your area to start a "lunch bunch."
- Meet bimonthly for lunch, brainstorm ideas, work in conjunction with another massage therapist for reciprocal referrals when either is out of town or unavailable.

FEBRUARY

- Send Valentine's Day postcards to clients to offer a two-for-one "sweetheart" deal.
- Pinpoint an area of interest—working with seniors, college students or new moms, for example. Place an ad in an appropriate newsletter or newspaper.
- Keep it short and sweet.
- Contact another small business owner in your area. Offer to place his or her brochures in your office, in exchange for a display of yours.

MAY

- Bimonthly newsletter, including tips on eating well from the garden, massage for joggers and massage for weekend warriors.
- Contact two past clients and offer a May Day special—one free massage if they buy a series of five.
- Send an E-mail to all current and past clients with a "summer special," 15 percent off if they make an appointment before the official start of summer
- Make a Mother's Day promotion.

MARCH

- Bimonthly newsletter, including tips for spring (getting back into shape, massage and allergies, etc.).
- Volunteer at a spring race.
- Call two past clients and offer a "spring special," 10 percent off in March.
- Consider creating a Web site (for more information, see Fall 2004 issue).

JUNE

- A bride special—send out postcards offering special packages to bridal parties.
- Place an ad in your local newspaper. Highlight your specialties.
- Sign up to talk about massage at a local health club, or senior center. Find a topic that appeals to a range of clients, such as "carpal tunnel and massage" or "how massage can help you lose weight" or "headaches and massage."
- Make a Father's Day promotion.

JULY

- Bimonthly newsletter, including tips on staying safe in the sun, drinking enough water and massage for swimmers.
- Place your brochures at three local health centers, such as health clubs, medical centers or yoga centers.
- Offer five-minute massages at your local farmer's market or summer fair.

OCTOBER

- Send out Halloween postcards to all clients—past and current—offering a “special so good it’s scary.”
- Get candy made up with your business name on the wrapper to give out for Halloween.
- Offer five-minute massages at your local health food store.

AUGUST

- Contact two past clients and offer an “end-of-summer” deal—20 percent off if they make an appointment before Labor Day.
- Clean out your client list; update all contact information.
- If you have a place of worship—church, synagogue, mosque or temple, donate your services for a fundraiser.

NOVEMBER

- Bimonthly newsletter, including tips for a healthy Thanksgiving, and massage and beauty.
- Take out a larger ad in the *Yellow Pages*. (And consider placing an ad in the online *Yellow Pages*. A recent survey showed that consumers are more likely to close the deal if they find you through the online version.)
- For those with a Web site, create an “Internet Only” special, where you announce the special by E-mail and make it available for those who reply by E-mail.

SEPTEMBER

- Bimonthly newsletter, including tips on massage and teens, massage for bike enthusiasts and enjoying the harvest of fall.
- Place an ad in your local college's newspaper, offering back to school specials for students.
- Ask your clients to fill out a feedback form, including questions such as “How did you hear about me?” or “Why do you get massage?”

DECEMBER

- Send out holiday cards in which you wish all your clients—past and present—a very happy holiday season and a healthy new year.
- Have holiday “goodies” in your office for clients—pens with your name on them, healthy candy or an ornament with your name on them.
- Offer “Santa’s special”—10 percent off gift certificates.

LEGALITIES

Laws
Resources
Ethics



THE CITY OF SAN DIEGO

OFFICE OF SMALL BUSINESS

10 Key Steps to Starting a Business

(For Businesses within San Diego City Limits)

There are several key steps to starting a business in the City of San Diego. The steps may vary according to the type of business you intend to start, but the following 10 steps will give you a general idea.

Note: Many of the following steps can be researched and accomplished by first visiting the respective web sites listed, rather than calling or visiting agency offices.

For those business start-ups that do not have access to the Internet, you may visit any of the City's Community Service Centers or Public Libraries and get online.

1. Get Basic Information

The City of San Diego's Main Library provides significant resource materials, including information on market research, trademark and service marks, how-to books on a variety of businesses and industries, etc. The Central Library also offers workshops on patent, trademark and copyright issues. For more information, contact:

City of San Diego Public Library
820 E Street, San Diego, CA 92101
(619) 236-5800 website: www.sandiego.gov/public-library/

The U.S. Small Business Administration has a Business Resource Center which provides a one-stop location for free access to a variety of information, education and training designed to help entrepreneurs start, operate and grow their business. In addition, there is on-site free counseling provided by the Service Corps of Retired Executives (SCORE). For more information contact:

U.S. Small Business Administration
550 West "C" Street, Suite 550, San Diego, CA 92101
(619) 557-7272 website: www.sba.gov/regions/states/ca/sandiego

The City of San Diego's Office of Small Business acts as an information clearinghouse for City programs and those of other agencies in the area. The information can be requested via e-mail or telephone or can be accessed on-line or by visiting the office. Seminars such as the ABC's of Starting, Growing, and Financing Your Small Business, are offered periodically. Additionally, the Small Business Advocate can assist you with City zoning, permitting and regulatory challenges.

City of San Diego, Office of Small Business
600 B Street, Fourth Floor, San Diego, CA 92101
(619) 533-4233 e-mail: sdbusiness@sandiego.gov
website: www.sandiego.gov/economic-development/business-assistance/small-business/

2. Create a Business Plan

A business plan is like a roadmap; it shows you where you are in relation to where you want to be. Whether you believe in a business plan or not, starting a business involves many ideas that need to be documented and actions that need to be taken. Many businesses fail without a business plan, and furthermore, banks require one prior to being considered for a loan. Contact:

U.S Small Business Administration, Service Corps of Retired Executives

550 West C Street, Suite 550, San Diego, CA 92101

(619) 557-7272 website: www.sba.gov/regions/states/ca/sandiego

3. Determine a Business Name

The name you choose for your business is very important. If the name you choose is your own legal surname and a one-word description (such as John Smith Roofing) then you are not required to register a fictitious business name. If you choose a business name that does not meet these parameters (such as JS Expert Roofing) and your business is not registered with the state then state law requires you to file a *fictitious business name statement* with the County of San Diego. Please note that this statement does not protect the business name.

County of San Diego, Assessor/Recorder/County Clerk's Office

1600 Pacific Highway, Room 260, San Diego, CA 92101

(619) 237-0502 website: www.sdcountry.ca.gov/arcc

4. Determine the Legal Structure of the Business

Several legal structures exist in the state of California. Your choice of legal structure will affect your income taxes and personal liability. Most businesses start as a **Sole Proprietorship** or a **General Partnership** and are generally the least complicated. **Limited Partnerships, Limited Liability Partnerships, Corporations and Limited Liability Companies** must register with the Secretary of State. You are strongly advised to contact your own accountant or attorney for advice and assistance in determining the best legal structure for you and your business.

California Business Portal

(916) 324-6769 website: www.ss.ca.gov/business/business.htm

IRS'S Technical Services Division

(800) 829-1040 website: www.irs.treas.gov

5. Determine the Business Activity Type

There is a classification system for business activity types in San Diego, which identifies a business activity and determines many of the start-up requirements and where the business can be located. Determine the general business activity type from the list below. The same list is also provided with the Business Tax Certificate application.

Agriculture (11)	Transportation and Warehousing (48-49)	Educational Services (61)
Mining (21)	Information Services (51)	Health Care/Social Assistance (62)
Utilities (22)	Finance and Insurance (52)	Arts/Entertainment/Recreation (71)
Construction (23)	Real Estate/Rental/Leasing (53)	Accommodation/Foodservices (72)
Manufacturing (31-33)	Professional/Scientific/Technical (54)	Other Services (81)
Wholesale (42)	Management Services (55)	Public Administration (92)
Retail (44-45)	Administrative Support (56)	

For more information on business activity type contact:

City Treasurer's Office
1200 Third Ave., First Floor, San Diego, CA 92101
(619) 615-1500 website: www.sandiego.gov/treasurer/index.shtml#btax

6. Select a Site and Determine Zoning and Site Permit Requirements

Determining zoning requirements prior to signing a lease or contract is imperative. You must check with the City to see if the type of business you plan to operate is legal in the desired location. You can usually receive same day information on the status of your location if you have the proposed business address and a description of the business when you contact:

City's Development Services Department
1222 First Avenue, Third Floor, San Diego, CA 92101
website: www.sandiego.gov/development-services/smallbus/

Zoning - (619) 446-5000

Permits - (619) 533-3089

If operating from home, you must follow the requirements for Home Occupations. You can obtain this information by contacting:

Neighborhood Code Compliance
(619) 236-5500 website: www.sandiego.gov/nccd/zoning/home.shtml

7. Obtain Any Special Licenses and Permits

The business activity type chosen determines the licenses and permits needed to operate a business legally. Some of the key contacts are listed below.

The CalGOLD database provides detailed information on the business permit, license and registration requirements from all levels of government. The information includes a description of the requirement, the name, address, and telephone number of the agency, and frequently, a direct link to that agency's Internet web pages. The information identified is specific to the type of business and its location in California.

CalGOLD
(916) 322-7394 website: www.calgold.ca.gov

For a list of more than 200 regulated Occupations and Professional Services, contact:

State Department of Consumer Affairs
(800) 952-5210 website: www.dca.ca.gov

For the list of **Police Regulated Business** within the City of San Diego, contact:

San Diego Police Licensing Division
(619) 531-2250

Businesses selling tangible personal property in the state of California must apply for **Seller's Permit/Resale Number**

State Board of Equalization
1350 Front Street, Room 5047, San Diego, CA 92101
(619) 525-4526 website: www.boe.ca.gov

Businesses engaged in selling goods by weight or volume must register the devices with the County Agriculture, Weights and Measures Office. Permits must usually be obtained by: import/export businesses, agricultural-related production, and businesses using pesticides.

County - Agricultural, Weights and Measures Department

5555 Overland Ave., Bldg 3
San Diego, CA 92122-1295
(858) 694-2739 www.sdcawm.org

Business engaged in: selling or handling food products, operating a pool or spa, handling hazardous materials, underground storage tanks, medical wastes, x-ray equipment, or waste handling must contact the Department of Environmental Health at the County.

County - Environmental Health

1255 Imperial Ave., Third Floor
San Diego, CA 92101
Tel: (619) 338-2222, Fax: (619) 338-2377
www.sdcdeh.org

Other permits and licenses may also be required.

8. Get Tax Information

Several types of taxes may be levied on businesses including income tax, employment tax and the City's Business Tax. For City tax information contact:

City Treasurer's Office
(619) 615-1500 website: www.sandiego.gov

For state taxes visit the California Tax Information Center that is sponsored by California's tax agencies (Board of Equalization, Employment Development Department, and Franchise Tax Board) and the IRS.

California Tax Information Center website: www.taxes.ca.gov/

For a copy of "Striking Gold in California", which outlines state taxes for businesses, contact:
State Board of Equalization (800) 400-7115 website: www.taxes.ca.gov/doingbus.html

For federal tax information and a copy of the "Small Business Resource Guide" an invaluable tool to help business owners understand the basics contact:

Internal Revenue Service (800) 829-1040 website: www.irs.treas.gov

9. Employer Responsibilities

A whole new set of responsibilities arises when a business hires employees. Employers must register as an employer and obtain a federal Employer Identification Number (EIN), pay additional taxes, withhold, match and submit employee withholdings, must obtain worker's compensation insurance and adhere to employee eligibility regulations.

The EIN, also known as a Federal Tax Identification Number, is a nine-digit number that the IRS assigns to business entities. The IRS uses this number to identify taxpayers that are required to file various business tax returns. EINs are used by employers, sole proprietors, corporations, partnerships, non-profit organizations, trusts and estates, government agencies, certain individuals and other business entities. Federal Employer ID numbers can be obtained by completing form SS-4 on-line or calling:

Internal Revenue Service

(800) 829-4933 website: www.irs.gov/businesses/small/article/0,,id=102767,00.html

Get information on state requirements, taxes and services for employers by contacting:
Employment Development Department: website: www.edd.ca.gov/employer.htm

10. Apply for a Business Tax Certificate (License)

Anyone doing business in the City of San Diego for more than six days in one calendar year must have a business tax certificate. Home-based businesses, self employed persons and independent contractors are also required to have a business tax certificate. The applications can be obtained and filed at the following locations or downloaded from the City’s website:

City Treasurer’s Office, Business Tax Division

1200 Third Ave., First floor, San Diego, CA 92101

(619) 615-1500 website: www.sandiego.gov/treasurer/index.shtml#btax

City of San Diego Community Service Centers

Clairemont 4731 Clairemont Drive.....	(858) 581-4111
Navajo 7381 Jackson Drive.....	(619) 668-2700
Peninsula 3740 Sports Arena Blvd., Suite 2.....	(619) 692-4970
Rancho Bernardo 17110 Bernardo Center Drive.....	(858) 538-8070
San Ysidro 663 E San Ysidro Blvd.....	(619) 424-0230
Scripps Ranch 11885 Cypress Canyon Road.....	(858) 538-8200

By following these key steps, the process should run more smoothly. If you do encounter obstacles with the process, or with permitting, zoning, etc., contact the City of San Diego’s Office of Small Business. The office maintains a small business advocacy/ombuds program, which is designed to provide zoning, permit, and regulatory assistance to small businesses.

City of San Diego, Office of Small Business

600 B Street, Fourth Floor, San Diego, CA 92101

(619) 533-4233 e-mail: sdbusiness@sandiego.gov

website: www.sandiego.gov/economic-development/business-assistance/small-business/

Additional Resources and Information.

Financial Resources

Several financial resources exist for small businesses in San Diego. However, loans are **generally not available** to start-ups. Most loan programs require that businesses have at least one year of history.

Loan Programs

CDC Small Business Finance Corporation
Tel: (619) 291-3594, Fax: (619) 291-6954
California Southern Small Business
Development Corp./State of California Loan
Guarantee Program
Tel: (619) 232-7771, Fax: (619) 232-6743

Micro Loans

ACCION San Diego (requires at least six
months of business operation)
Tel: (619) 685-1380, Fax: (619) 685-1470
www.accion.org

Business Loans

City of San Diego,
Community & Economic Development Dept.
Business Finance Section
600 B Street, 4th Floor
San Diego, CA 92101
(619) 533-7408
www.sandiego.gov/

Matching Grant Programs

Storefront Improvement Program
City of San Diego
Office of Small Business
Tel: (619) 685-1390, Fax (619) 685-1391
www.sandiego.gov

Certification and Contracting Opportunities

Certification for City Contracts

City of San Diego Contract Services,
Equal Opportunity Contracting Program
1010 Second Ave., 5th Floor
San Diego, CA 92101
Tel: (619) 533-4464, Fax: (619) 533-4474
www.sandiego.gov

State Certification as a Small Business

Office of Small Business Certification &
Resources, California Department of General
Services
(916) 322-5060
www.osmb.dgs.ca.gov/

Small Business Registration

Small Business Administration
550 West C Street, Suite 550
San Diego, CA 92101
(619) 557-7250
www.pro-net.sba.gov/pro-net/register.html

Contracting with City of San Diego

City of San Diego Purchasing Division
1200 Third Ave., Suite 200
San Diego, CA 92101-4195
Tel: (619) 236-6000, Fax: (619) 533-3236
www.purchasing@sandiego.gov

Contracting Opportunities Center

Southwestern College
4007 Camino Del Rio South, Suite 210
San Diego, CA 92108
Tel: (619) 285-7020, Fax: (619) 285-7030
www.ptac-sandiego.org

County of San Diego Resources

County Property Tax Information

Assessor, Recorder, County Clerk
1600 Pacific Highway, Room 103
San Diego, CA 92101
(619) 236-3771
www.sdcounty.ca.gov/arcc

County Zoning Information

County Department of Planning & Land Use
5201 Ruffin Road, Suite B
San Diego, CA 92123
(858) 565-5981
www.sdcounty.ca.gov/dplu/

County Air Pollution Control

County Small Business Assistance Program
9150 Chesapeake Drive
San Diego, CA 92123
Tel: (858) 650-4700, Fax: (858) 650-4659
www.sdapcd.co.san-diego.ca.us

County Office of Trade & Business Development

5201 Ruffin Road, Suite N
San Diego, CA 92123
Tel: (858) 495-5494, Fax: (858) 495-5400
www.co.san-diego.ca.us/cnty/cntydepts/landuse/ombuds/

State of California Resources

Many City of San Diego businesses will need to work with state agencies if they intend to incorporate their business, sell alcohol and other goods, hire employees, etc.

State Payroll Taxes

State Employment Development Department
3110 Camino Del Rio South, Suite 100
San Diego, CA 92108
Tel: (619) 516-1920, Fax: (619) 516-1930
www.edd.ca.gov

State Alcohol Sales Licensing

State Alcoholic Beverage Control
1350 Front St., Suite 5056
San Diego, CA 92101
Tel: (619) 525-4064, Fax: (619) 231-1171
www.abc.ca.gov

State Worker's Compensation

State Compensation Insurance Fund
9444 Waples St.
San Diego, CA 92121
(858) 552-7000
www.scif.com

State Incorporation Information

California Secretary of State
1350 Front St., Suite 2060
San Diego, CA 92101
(619) 525-4113
www.ss.ca.gov

U.S. Federal Government Resources

The federal government provides a host of pertinent information and services to small businesses, including consulting services, tax information, export information and wage and hour information.

Income Tax Information

Internal Revenue Service
880 Front St., First Floor
San Diego, CA 92188
Information: (800) 829-1040
Forms and Publications: (800) 829-3676
www.irs.treas.gov

Export Information

Department of Commerce
6363 Greenwich Drive, Suite 230
San Diego, CA 92122-3939
(619) 557-5399
www.doc.gov

Import & Customs

Bureau of Customs & Border Protection
Airport and Seaport (619) 557-5370
Otay Mesa Border (619) 661-3281
Tecate Border (619) 478-5356
www.customs.treas.gov

Wage & Hour Information

U.S. Department of Labor
5675 Ruffin Road, Suite 310
San Diego, CA 92123-5378
(619) 557-5606
www.dol.gov

Social Security Information

Social Security Administration
1333 Front St.
San Diego, CA 92101
Tel: (800) 772-1213
www.ssa.gov

Internet Business

Mail or Telephone Order Business

Federal Trade Commission
1-877-382-4357
www.ftc.gov/

Market Research, Technical Assistance And Networking Opportunities

General Information, Research and Networking

San Diego Regional Chamber of Commerce
402 W. Broadway, Suite 1000
San Diego, CA 92101
Tel: (619) 544-1300, Fax: (619) 744-7481
www.sdchamber.org

Small Business Consulting

Southwestern College -- Small Business
Development & International Trade Center
900 Otay Lakes Road, Suite 1600
Chula Vista, CA 91910
Tel: (619) 482-6391, Fax: (619) 482-6402
www.sbditc.org

Demographics

San Diego Association of Governments
401 "B" Street, Suite 800
San Diego, CA 92101
Tel: (619) 595-5353, Fax: (619) 595-5305
www.sandag.org

Fermanian Business Center

Point Loma Nazarene University
3900 Lomaland Drive
San Diego, CA 92106
(619) 849-2564
www.ptloma.edu/fermanianbusinesscenter/

Business Improvement Districts

BID Council
121 Broadway, Suite 501
San Diego, CA 92101
Tel: (619) 239-2437, Fax: (619) 239-0714
www.bidcouncil.org

Entrepreneur Clinic – USD Law School

University of San Diego
5998 Alcalá Park
San Diego, CA 92110-7425
(619) 260-7470

Health Care Program Information

San Diego Business Healthcare Connection
1551 Fourth Avenue, Suite 440
San Diego, CA 92101
Tel: (619) 231-0338
www.sdbhc.org

Food & Beverage Association of S.D. County

3110 Camino Del Rio South, Suite 315
San Diego, CA 92108
(619) 228-2291 Fax: (619) 228-2297
<http://www.foodnbeverage.org/>

*City of San Diego
Community and Economic Development Department
Revised May 2006*

Effective July 1, 2001

LEGALITIES

(in a nutshell)

Applies to the city of San Diego only, any other area-check with local licensing
For San Diego, contact Police Dept. for application and information. please contact the
Police Dept. for most current charges.

Massage Trainee Permit = 200hrs. training

- License to touch, must work for someone who has a business license
(as their employee)
- Steps to getting it: police dept. application, fingerprints, photo, and fees
- Must complete requirements for Massage Therapist Lic. within 2 years.
- May not be extended or renewed.

Massage Therapist Permit = 500 hrs. training

- Must pass National Certif. Exam in addition to training
- May obtain both Business Tax Certif. & Off-Premises Permit to work for self.
- Steps to getting it: police dept. application, fingerprints, photo, and fees
- Renewal requires 12 hrs. Cont. education.

Business Tax Certificate = avail. to any business owner in city

- Need if you are working as an independent contractor (business owner)

Off-Premises Permit = outcall, going to clients home or working several locations as
independent contractor, must have both Massage Therapist. & Bus. Lic. to apply.

- Means you will work not work at a fixed location

Holistic Health Practitioner (HHP) Permit = 1000hrs. training

- Must pass National Certif. Exam in addition to training
- Allows you to work for self, may work from fixed location, do outcall or both.
- Renewal requires 12hrs. Cont. Ed.

Holistic Health Practitioner (HHP) Business Permit = 1000hrs. training

- Allows you to hire either employees (HHP or Massage Therapist) or
have contractors working with you.
- Required for those in a group practice at a fixed location or those sharing space.

Massage Establishment Lic. = available to anyone with or without Massage training

- is a type of business lic.
- Requires Police Dept., Health Dept. and Fire Dept. inspections
- Allows you to work at a fixed location (office, spa, clinic)
- Allows you to hire Massage Trainees or Therapists.

please see other side =>

Rules and Regulations to operate as a Massage Trainee/Therapist/HHP:

- May only operate between hours of 6am - Midnight
- Must drape clients appropriately (specified anatomical areas covered)
- Must dress appropriately, opaque clothing covering from neck to 3 in. below crotch
- Must wear name tag, with name as it appears on police permit
- Must not intentionally touch specified anatomical areas of client
- Must include permit number on any and all advertising media
- Must only offer those services which are conspicuously posted
- Must advise clients of regulations regarding draping, and touching of specified anatomical areas prior to session. (either by posted sign or on intake form).
- All linens, tools and equipment must be kept safe and sanitary

Zoning Regulations = if you live in a residential area: "you may operate a business out of your home, but you cannot have employees come there or clients come there." If you live in a commercially zoned area then it is okay to work out of your home (if you are not a HHP, you will need to set-up as a Massage Establishment.) Best to get an office or other professional space; or go to clients.

Fictitious Name Statement (DBA) = needed for anyone calling their business a name other than their own personal name. Obtain from county clerk's office: check to make sure no one else is using that name, complete application, pay fees, publish in newspaper.

**San Diego Police Department
Permits & Licensing
1400 "E" Street
MS 735 619-531-2250**

Police Permits

San Diego Police Department
Permits & Licensing
1400 "E" Street, San Diego
(619) 531-2250 (recording)

Sound Permit

City of San Diego, Information Technology
and Communications
1220 Caminito Centro, San Diego
(619) 525-8650

Health Permit

County of San Diego
Environmental Health Services
1255 Imperial Avenue, San Diego
(619) 338-2222

Alcoholic Beverage License

State of California
Alcoholic Beverage Control Department
1350 Front Street, Rm. 5056, San Diego
(619) 525-4064

Seller's Permit

State of California
Board of Equalization
1350 Front Street, San Diego
(619) 525-4526

Zoning Approval

City of San Diego
Development Services Center
1222 First Avenue, 3rd Floor, San Diego
(619) 446-5000

Fire Marshal Permit

City of San Diego
Fire & Life Safety Department
1010 Second Avenue, 3rd Floor, San Diego
(619) 531-4300

Public Assembly Permit

City of San Diego
Fire Hazard Prevention Services
1010 Second Avenue, 3rd Floor, San Diego
(619) 533-4400

Fictitious Names

San Diego County Clerk
Assessors Office
1600 Pacific Highway, Rm. 260, San Diego
(619) 237-0502

Non-Profit Status

State of California
State Franchise Tax Board
5353 Mission Center Rd., Ste. 314, San Diego
(800) 852-5711

Registry of Charitable Trust

State of California
Attorney General's Office
P.O. Box 903447
Sacramento, Ca. 94203-4470
(916) 445-2021/2022

Business Tax Certificate

San Diego City Treasurer's Office
Business Tax & Licensing
1200 Third Avenue, 1st Floor, San Diego
(619) 615-1500



SAN DIEGO POLICE DEPARTMENT - PERMITS AND LICENSING
 1400 'E' STREET, MS-735, SAN DIEGO, CA 92101
 Telephone No.: (619) 531-2250



MESSAGE REGULATORY PERMITS

San Diego Municipal Code (SDMC), Section 33.0101(c) states you must have a valid Police Permit to operate a business designated as police regulated. You are responsible for being familiar with and complying with the rules and regulations related to massage. Copies of the Message Ordinance and General Divisions for police regulated activities may be obtained from the City Clerk's office located at 202 C Street, 2nd Floor, Tel. No.: (619) 533-4000 or via the City's website: www.sannet.gov / (Department, City Clerk, Documents, Municipal Code) SDMC Chapter 3, Article 3, Division 35 and Divisions 1-5.

DEFINITIONS:

"MASSAGE" - means any method of pressure on, or friction against, or stroking, kneading, rubbing, tapping, pounding, vibrating, or stimulating the external parts of the human body with the hands or other parts of the body, with or without the aid of any mechanical or electrical apparatus or appliances, or with or without supplementary aids such as rubbing alcohol, liniments, antiseptics, oils, powder, creams, lotions, ointments or other similar preparations commonly used in this practice.

"NCBTMB" - means the National Certification Board for Therapeutic Massage and Bodywork. They can be reached at Tel. No.: (800) 296-0664 or at their website: www.ncbtmb.com.

"NCCAOM" - means the National Certification Commission of Acupuncture and Oriental Medicine. They can be reached at Tel. No.: (703) 548-9004 or website: www.nccaom.org.

"State-approved school" - means any school or institution within the United States which is approved by the state in which it resides for the teaching of massage.

ALL APPLICANTS MUST APPLY IN PERSON

TYPES OF MESSAGE PERMITS:

- **MESSAGE TRAINEE** (Student Permit) - Requires a minimum of 200 hours of training. Massage trainees may provide off-premise massage only when the employer is on the premises where the services are provided. A massage trainee is employed by a massage establishment, exempt individual or a Holistic Health Practitioner Business. This permit is valid for two years and is **not** renewable.
- **MESSAGE THERAPIST** - Requires a minimum of 500 hours and NCBTMB or NCCAOM National Certification. The massage therapist permit is not a license to operate a massage establishment. A massage therapist is employed by a massage establishment, exempt individual or a Holistic Health Practitioner Business. This permit is valid for one.
- **OFF PREMISE MESSAGE THERAPIST BUSINESS** - means the business of providing massage services by appointment at a location other than a fixed location e.g., a *massage establishment*. It includes *massage therapists* who provide *off-premise massage* services and who are self-employed and/or who contract with or work for a business other than a massage establishment. (Any person desiring to operate an off-premise massage business but who will not personally provide massage services may obtain an off-premise massage business permit provided they meet all the application requirements, except the educational requirements, and the person does not possess an outcall nude entertainment business or outcall nude entertainer permit.)
- **MESSAGE ESTABLISHMENT** - Means a fixed place of business where any person engages in massage. The person who possesses this permit does not need to be a massage therapist.

The following outlines the required paperwork for the police-regulated massage industry permits. All applications must be submitted in person at the Permits and Licensing Unit, 1400 E Street, San Diego, CA. You must have all the required paperwork when you apply.

INCOMPLETE APPLICATIONS WILL NOT BE ACCEPTED.

MESSAGE TRAINEE INFORMATION

- **APPLICATION** and **STATEMENT OF UNDERSTANDING**.
- **200 HOURS** – Original transcripts showing completion of 200 hours of instruction from any state-approved school in a massage specialty and a therapeutic approach in caring for clients. **The applicant must provide proof that the school or schools attended by the applicant were state-approved schools (United States).**
- **LETTER OF INTENT TO EMPLOY** - A letter from the applicant's prospective employer stating that person or business intends to employ the applicant as a **massage trainee**. The letter has to be from a permitted massage establishment or an exempt individual.
- **LIVE SCAN FINGERPRINTS** are required for all new applicants. Fill out the attached "Request for Live Scan Service" form and bring it with you to the Live Scan agency. See attached list of locations. Completed Live Scan Fingerprint Request forms must be submitted with the application within **thirty days**.
- **IDENTIFICATION** - Valid government issued picture identification card (i.e., driver's license or military I.D., passports are **NOT** an acceptable form of identification.)
- **FEES** - Cash, personal check, cashier's check or money order for **\$194.05**. This fee includes payment for the regulatory fee of \$84.00, investigation fee of \$55.00; photo I.D. card of \$15.00 and the written and practical exam fee for the County of \$40.05. Please make checks payable to the City Treasurer. **NO THIRD PARTY/OUT-OF-STATE CHECKS WILL BE ACCEPTED.**
- **HEALTH DEPARTMENT EXAMS** – You must take the County Health Department's written and practical exam for massage. The exam must be taken within **twenty (20) days** of the date your application was submitted to the SDPD's Permits and Licensing Unit. The results of the exam must be returned to the Permits and Licensing Unit within thirty (30) days of the application being submitted to the Permits and Licensing Unit.
- A San Diego County Health Department form letter will be provided to you when your application is accepted. It is your responsibility to contact the Health Department for an appointment to take the written and practical exam. If you do not pass the test within **twenty (20) days** your application will be denied.

MESSAGE THERAPIST INFORMATION

- **APPLICATION** and **STATEMENT OF UNDERSTANDING**.
- **500 HOURS** – Original transcripts showing completion of 500 hours of instruction from any state-approved school in a massage specialty and a therapeutic approach in caring for clients. **The applicant must provide proof that the school or schools attended by the applicant are state-approved schools (United States).**
- **NATIONAL CERTIFICATION EXAM** – Original Diploma for National Certification Exam administered by NCBTMB or NCCAOM. Any questions regarding the national certification process should be directed to the NCBTMB or NCCAOM at previously provided phone numbers/website addresses.

- **LIVE SCAN FINGERPRINTS** are required for all new applicants. Fill out the attached "Request for Live Scan Service" form and bring it with you to the Live Scan agency. See attached list of locations. Completed Live Scan Fingerprint Request forms must be submitted with the application within **thirty (30) days**.
- **IDENTIFICATION** - Valid government issued picture identification card (i.e., driver's license or military I.D., passports are **NOT** an acceptable form of identification.)
- **FEES** - Cash, personal check, cashier's check or money order for **\$154.00**. This fee includes payment for the regulatory fee of \$84.00, \$55.00 investigation fee; and photo I.D. card of \$15.00. Please make checks payable to the City Treasurer. **NO THIRD PARTY/OUT-OF-STATE CHECKS WILL BE ACCEPTED.**

MASSAGE THERAPIST OFF PREMISE / OFF PREMISE BUSINESS INFORMATION

- **APPLICATION, BUSINESS ADDENDUM and STATEMENT OF UNDERSTANDING.**

****PLEASE NOTE: FOR OFF-PREMISE BUSINESS ONLY PERMITS, EDUCATION**

REQUIREMENTS ARE NOT NEEDED. THIS PERMIT IS FOR BUSINESS OWNERS THAT DO NOT PERSONALLY PROVIDE MASSAGE SERVICES.

- **500 HOURS** – Original transcripts showing completion of 500 hours of instruction from any state-approved school in a massage specialty and a therapeutic approach in caring for clients. **The applicant must provide proof that the school or schools attended by the applicant are state-approved schools (United States).**
- **NATIONAL CERTIFICATION EXAM** - Original Diploma for national certification exam administered by NCBTMB or NCCAOM. Any questions regarding the national certification process should be directed to the NCBTMB or NCCAOM at the above provided phone numbers or website addresses.
- **BUSINESS TAX CERTIFICATE (BTC)** - A copy of your current BTC from the San Diego City Treasurer's Office, 1200 Third Avenue (1st Floor), San Diego, CA 92101 at (619) 615-1500.
- **LIVE SCAN FINGERPRINTS** are required for all new applicants. Fill out the attached "Request for Live Scan Service" form and bring it with you to the Live Scan agency. See attached list of locations. Completed Live Scan Fingerprint Request forms must be submitted with the application within **thirty (30) days**.
- **IDENTIFICATION** - Valid government issued picture identification card (i.e., driver's license or military I.D., passports are **NOT** an acceptable form of identification.)
- **FEES** - Cash, personal check, cashier's check or money order for **\$387.00**. This includes the regulatory fee of \$84.00 massage therapist fee; \$233.00 off-premise fee, \$55.00 investigation fee; and \$15.00 photo I.D. card. If you plan on having an Off Premise Business only, the fees will be \$298.00 plus \$15.00 photo fee). Please make checks payable to the City Treasurer. **NO THIRD PARTY/OUT-OF-STATE CHECKS WILL BE ACCEPTED.**

MASSAGE ESTABLISHMENT INFORMATION

- **APPLICATION, BUSINESS ADDENDUM and STATEMENT OF UNDERSTANDING.**
- **BUSINESS TAX CERTIFICATE (BTC)** - A copy of your current BTC from the San Diego City Treasurer's Office, 1200 Third Avenue (1st Floor), San Diego, CA 92101 - (619) 615-1500.
- **HEALTH PERMIT** - A copy of your current health permit from the County of San Diego, Environmental Health Services, 1255 Imperial Avenue (3rd Floor), San Diego, CA 92102 at Tel. No. (619) 338-2222.
- **LIMITED PARTNERSHIP** - A copy of the limited partnership's certificate as filed with the County Clerk (if applicable).

- **ARTICLES OF INCORPORATION** - A copy of the State of California's Articles of Incorporation must be submitted if a corporation is applying.
- **LEASE OR PROOF OF OWNERSHIP** - A copy of your lease or rental agreement and amendments or proof of ownership for the property where the business is to be conducted.
- **LIVE SCAN FINGERPRINTS** are required for all new applicants. Fill out the attached "Request for Live Scan Service" form and bring it with you to the Live Scan agency. See attached list of locations. Completed Live Scan Fingerprint Request forms must be submitted with the application within **thirty (30) days**.
- **IDENTIFICATION** - Valid government issued picture identification card (i.e., driver's license or military I.D., passports are **NOT** an acceptable form of identification.)
- **REGULATORY FEES:** cash, personal check, cashier's check, or money order for the following: \$884.00 Massage Establishment regulatory; \$15.00 photo fee and \$55.00 investigation fee for each applicant. Please make checks payable to the City Treasurer. **NO THIRD PARTY/OUT-OF-STATE CHECKS WILL BE ACCEPTED.**

PLEASE NOTE: In order to legally perform a massage, you must be in possession of a valid police department-issued permit. You must also have an off-premise massage permit or a massage establishment permit or be a bona-fide employee of the following:

1. Someone who possesses a massage establishment permit; or
2. Someone who possesses a Holistic Health Practitioner Business permit pursuant to Division 44; or
3. Someone who is state licensed (individual) who is exempt pursuant to SDMC 33.3513, e.g., physicians, surgeons, chiropractors, physical therapists, etc. The exempt individual has to be physically present at the location while the massage is administered.

If you are a massage therapist working for any individual or business and you are not on their payroll because you are self-employed or treated as an independent contractor, then you are **not** considered an employee. If you are operating from a fixed location and not an employee of a licensee or exempt individual as stated above, you will need a massage establishment permit. A massage therapist cannot rent space. Any person desiring to engage in off-premise massage must also obtain an off-premise massage business permit. You **cannot** use an off-premise massage permit to operate from a fixed location.

INVESTIGATION PERIOD: A thirty (30) day investigation period begins at the time each completed application is submitted. A criminal records check will be made on each applicant.

CHANGE OF EMPLOYMENT: You must notify the Permits and Licensing Unit of any change of employment within fifteen (15) calendar days of changing to the new employer.

RENEWING PERMITS: Permits must be renewed each year (except the Massage Trainee permit, which is valid for two (2) years and is non-renewable.) After the ten (10) day grace period (from the expiration date shown on your permit) you will be assessed a late fee and penalty fee.

REPLACEMENT CARDS: If a permit is lost or stolen, replacement cards are available for \$15.00 and must be applied for in person at the SDPD Police Permits and Licensing Unit.

2. List previous occupations, places of employment and/or schooling for the last five (5) years.

1	PLACE OF EMPLOYMENT	OCCUPATION	
	ADDRESS & PHONE	DATE FROM	DATE TO
2	PLACE OF EMPLOYMENT	OCCUPATION	
	ADDRESS & PHONE	DATE FROM	DATE TO
3	PLACE OF EMPLOYMENT	OCCUPATION	
	ADDRESS & PHONE	DATE FROM	DATE TO
4	PLACE OF EMPLOYMENT	OCCUPATION	
	ADDRESS & PHONE	DATE FROM	DATE TO
5	PLACE OF EMPLOYMENT	OCCUPATION	
	ADDRESS & PHONE	DATE FROM	DATE TO

3. List similar permits or licenses issued by any agency or board, or any city, county, state or federal agency in the past five (5) years. **IF NONE, INITIAL HERE:** _____

	TYPE OF LICENSE	LICENSE NUMBER	DATES HELD	CITY AND STATE
1.				
2.				
3.				

4. Have you ever had any permit or license issued by any agency or board, or any city, county, state or federal agency suspended or revoked? *Yes () No ()*

If yes, please complete below:

	CITY/STATE	DATE OF SUSPENSION OR REVOCATION	REASON
1.			
2.			
3.			

5. List all criminal convictions, except traffic convictions. Include pleadings of guilty to a lesser charge in satisfaction of, or as a substitute for, an original charge, and pleadings of *nolo contendere*. Expunged convictions must be listed per California Penal Code section 1203.4(a).

IF NONE, INITIAL HERE: _____

	CHARGE	DATE CONVICTED	LOCATION OF COURT
1			
2			
3			
4			
5			
6			

APPLICANTS: The right of reasonable inspection shall be a condition for issuance of a police permit. If a permit is issued, representatives of the police department shall have access to the business premises during normal business hours, which may include entry into the non-public portion of the business.

It is the responsibility of the permit holder to renew the permit no later than ten (10) calendar days after the expiration date on the permit. Failure to renew on time will result in penalty fee of \$25.00 plus 10% of the regulatory fee. If a renewal is not completed with all fees and penalties paid within thirty (30) days after the permit expiration date, the permit expires and business operations, occupations, or activities allowed by the permit must cease. A permittee must then begin the application process as a new applicant (Section 33.0308 of the San Diego Municipal Code).

I declare under penalty of perjury that the statements made on this application, including accompanying documents, are true, complete and correct to the best of my knowledge and belief. I understand that any false statements or information are grounds for denial of this application or loss of licensure and that I may be subject to prosecution per section 11.0401(b) of the San Diego Municipal Code.

I AM AWARE THAT THE INVESTIGATION FEE IS NON-REFUNDABLE. I AM AWARE THAT I AM RESPONSIBLE FOR BEING FAMILIAR WITH AND COMPLYING WITH THE RULES AND REGULATIONS RELATED TO THE POLICE REGULATED BUSINESS OR OCCUPATION FOR WHICH I AM APPLYING. I AM AWARE THAT THE GRANTING OF A POLICE PERMIT DOES NOT RELIEVE ME FROM OBTAINING PERMITS OR APPROVALS REQUIRED BY THE CITY OF SAN DIEGO OR STATE OR FEDERAL LAW. I AM AWARE THAT THE GRANTING OF A POLICE PERMIT DOES NOT RELIEVE ME FROM COMPLYING WITH ALL APPLICABLE LOCAL, STATE, AND FEDERAL LAWS, INCLUDING THOSE RELATED TO BUILDING, ZONING, AND FIRE, AND OTHER PUBLIC SAFETY REGULATIONS. I AM AWARE THAT THE GRANTING OF A POLICE PERMIT DOES NOT VEST ANY DEVELOPMENT RIGHTS IN THE PROPERTY OR BUSINESS.

APPLICANT'S SIGNATURE

DATE OF APPLICATION

PLEASE BE ADVISED THE INFORMATION YOU PROVIDE ON YOUR APPLICATION MAY BE SUBJECT TO PUBLIC DISCLOSURE PER THE CALIFORNIA PUBLIC RECORDS ACT.

SAN DIEGO POLICE DEPARTMENT PERMITS AND LICENSING UNIT

MASSAGE STATEMENT OF UNDERSTANDING – RULES AND REGULATIONS

PLEASE READ CAREFULLY

The massage therapist permit is not a license to operate a massage business. In order to legally perform a massage, you also need an off-premise massage business permit, or massage establishment permit, or be a bona-fide employee of the following:

1. Someone who possesses a massage establishment permit; or
2. Someone who possesses a Holistic Health Practitioner Business permit pursuant to Division 44; or
3. Someone who is a state licensed individual who is exempt pursuant to SDMC 33.3513, e.g., physicians, surgeons, chiropractors, physical therapists, etc. The exempt individual has to be physically present at the location while the massage is administered.

If you are a massage therapist working for any individual or business and you are not on their payroll because you are self-employed or treated as an independent contractor, then you are not considered an employee. If you are operating from a fixed location and not an employee of a licensee or exempt individual as stated above, you will need a massage establishment permit. A massage therapist cannot rent space. Any person desiring to engage in off-premise massage must also obtain an off-premise massage business permit. You cannot use an off-premise massage permit to operate from a fixed location.

Definitions:

“Massage Therapist” - means any person who gives or administers a massage to another person, for any form of consideration whatsoever.

“Massage” - means any method of pressure on, or friction against, or stroking, kneading, rubbing, tapping, pounding, vibrating, or stimulating the external parts of the human body with the hands or other parts of the body, with or without the aid of any mechanical or electrical apparatus or appliances, or with or without supplementary aids such as rubbing alcohol, liniments, antiseptics, oils, powder, creams, lotions, ointments or other similar preparations commonly used in this practice.

“Off-Premise Massage Therapist Business” - means the business of providing massage services by appointment at a location other than premises licensed as a *massage establishment*. It includes *massage therapists* who provide *off-premise massage* services and who are self-employed and/or who contract with or work for a business other than a massage establishment.

“Massage Establishment” - means a fixed place of business where any person engages in massage.

“State-approved school” - means any school or institution within the United States, which is approved by the state in which it resides, for the teaching of massage.

“Particular anatomical areas” - means the pubic region, human genitals, perineum, anal region, and the area of the female breast that includes the areola and the nipple.

The following is only a summary of the regulations. You are responsible for being familiar with and complying with all the rules and regulations related to massage. Copies of the Massage Ordinance and General Divisions for police regulated activities may be obtained from the City Clerk’s office located at 202 C Street, 2nd Floor, Telephone # (619) 533-4000 or via the City’s website: www.sannet.gov/ (Department, City Clerk, Documents, Municipal Code), SDMC Chapter 3, Article 3, Division 35 and Divisions 1-5).

Please initial each line:

- _____ 33.0105 - PERMIT DISPLAYED - Each licensee or permittee shall, at all times when requested, exhibit said license or permit to any peace officer or person doing business with the permittee. You should, therefore, have your original massage therapist permit available when conducting massage. Copies are unacceptable. Any permittee engaged in business at a fixed location must also post a copy of their permit in a conspicuous place in the business.
- _____ 33.0308 - RENEWAL RESPONSIBILITY - A permit shall be valid for a period of one year from the date of issuance. It is the responsibility of the permit holder to renew the permit no later than 10 calendar days after the expiration date. Failure to renew on time will result in penalty fees. If a renewal is not completed with all fees and penalties paid within 30 days after the permit expiration date, the permit expires and business operations, occupations, or activities allowed by the permit must cease and the permittee must begin the application process as a new applicant. The Police Department is not required to send a renewal notice and the failure to send such notice shall not affect the validity of any late fee or permit expiration.
- _____ 33.0312 – CHANGE OF EMPLOYERS – Massage Therapists and Massage Trainees must notify the Chief of Police in writing of any change of employment within 15 calendar days of changing to the new employer.
- _____ 33.3512 - MASSAGE TRAINEES - A trainee massage therapist permit is only valid for two years from the date of issuance. If a trainee does not obtain a massage therapist or off-premise massage therapist permit within two years, the trainee permit becomes null and void. A trainee permit may not be extended or renewed. The Chief of Police may require proof that a trainee is receiving ongoing instruction during the two-year period. The employer must be on the premises when the trainee provides off-premise massage services. The trainee must comply with all other regulations applicable to massage therapists.
- _____ 33.3513 - EMPLOYEES OF EXEMPT INDIVIDUALS - Any person conducting massage for an exempted class individual must possess a massage therapist permit and shall comply with all massage regulations. A massage technician employed by an exempted class individual must work under the direction and control of that individual who must be physically present at the location where the massage is being administered. A massage therapist cannot rent office space or workspace at an exempt individual's location. The massage therapist must obtain a massage establishment permit.
- _____ 33.3514 (b)–RENEWAL FOR MASSAGE THERAPIST PERMIT - In order to renew a massage therapist or off-premise massage therapist business permit, the permittee must provide proof of twelve hours of continuing education in massage therapy. The continuing education hours must be obtained from a facility or organization approved by the NCBTMB or the NCCAOM, or a state-approved school or any other certification organization recognized by the Chief of Police
- _____ 33.3514 (c)–RENEWAL FOR MASSAGE THERAPIST PERMIT - The permittee must show proof that the permittee's national certification is current. Proof from NCBTMB, NCCAOM, or any other certification organization recognized by the Chief of Police, is sufficient.
- _____ 33.3514 (d)–RENEWAL FOR MASSAGE THERAPIST PERMIT - This section does not apply to off-premise massage business permit holders described in Section 33.3508 (c).
- _____ 33.3515 - EQUIPMENT & CLEANLINESS REQUIREMENTS FOR MASSAGE ESTABLISHMENTS - Establishments must maintain equipment and facilities in a sanitary manner as detailed in Sections 33.3515 (a) through 33.3515(i).
- _____ 33.3517(a) - MASSAGE ESTABLISHMENT HOURS OF OPERATION AND SERVICES- It is unlawful for any person to allow the establishment to be open between 12:00 a.m. and 6:00 a.m. All customers, patrons and visitors must be excluded from the premises during these hours.
- _____ 33.3517(b) - MASSAGE ESTABLISHMENT POSTING OF SERVICES - A list of services available and the cost of such services shall be posted in an open and conspicuous public place on the premises. The services must be described in readily understandable language. No services other than those posted are allowed.

_____ 33.3518 - MASSAGE ESTABLISHMENT OPERATING REQUIREMENTS -

- Establishment shall provide patrons clean, sanitary and opaque coverings capable of covering the patron's particular anatomical areas.
- No responsible person shall permit a massage to be given unless the patron is covered by the covering provided by the establishment
- No responsible person shall permit any person in any area, which is used by patrons unless the person's particular anatomical areas are fully covered with an opaque covering.
- No responsible person shall permit any person to massage, or intentionally touch the particular anatomical areas of another person.
- The responsible person and permittee shall insure that patrons are advised of Sections 33.3518 (a)-(e), prior to treatment.

_____ 33.3524(a) - COVERING REQUIREMENTS - No massage therapist, while performing any task or service associate with the massage establishment or off-premise massage business, shall be present in any room with another person unless the person's "particular anatomical areas" are fully covered. This subsection does not apply to momentary nudity occurring in bathrooms, shower areas, or dressing or locker rooms.

_____ 33.3524(b) - PARTICULAR ANATOMICAL AREAS - No massage therapist, while performing any task for service associated with the business of massage, shall massage or intentionally touch the particular anatomical areas of another person.

_____ 33.3524(c) - NAME TAG REQUIRED - While working a massage therapist must wear a nametag containing the therapist's name as it appears on the police permit.

_____ 33.3524(d) - SANITARY REQUIREMENTS - It is unlawful to use towels, linens or instruments during the massage that are not in clean or safe condition.

_____ 33.3524 (e) - HOURS OF OPERATION - It is unlawful to provide massage services between 12:00 a.m. and 6:00 a.m.

_____ 33.3524(f) - ADVISAL REQUIRED - Permittee shall insure that patrons are advised of SDMC Section 33.3524 (a) & (b) prior to treatment. The advisal may be (1) posted in the room where the massage is conducted, or (2) contained in patron intake documents; or (3) posted in any other manner approved by the Chief of Police.

_____ 33.3524(g) - OFF-PREMISE PERMITEE RESPONSIBILITY - Any off-premise massage business permittee who hires, dispatches or contracts with other off-premises massage therapists to do off-premise massage is responsible for ensuring that those therapists comply with all applicable regulations. The permittee must also make reasonable efforts to prevent criminal activity. In addition to all other grounds, prostitution by such therapists is grounds for revoking the permit.

_____ 33.3525 - CLOTHING REQUIREMENTS - Massage technicians must be fully covered by an opaque material from the base of the neck to a point four (4) inches above the center of the kneecap, excluding the arms. Shorts may be worn if they extend down the leg a minimum of three (3) inches from the crotch.

_____ 33.3526 - ADVERTISING REQUIREMENTS - Effective July 1, 2002, all advertising shall include the police permit number in any advertisement of services appearing in any newspaper, telephone directory, printed advertising medium, or electronic media. The reference does not have to contain the words "police permit". "City of San Diego permit number 1111," or similar language, will suffice so long as the correct police permit number is included.

I have read and understand the San Diego Municipal Code requirements listed above. If I have any questions regarding these requirements or my employment in a police regulated occupation, I understand that I may schedule an interview with a representative from the Police Permits & Licensing office.

Sign and Date:

DATE

SIGNATURE

PRINTED NAME

Received by: _____

Police Permit Application

BUSINESS ADDENDUM

SAN DIEGO POLICE DEPARTMENT

1400 'E' STREET · M.S. 735 · SAN DIEGO, CA 92101

PLEASE COMPLETE ALL SECTIONS

(TYPE OR PRINT LEGIBLY)

TYPE OF PERMIT: _____ **LOCATION:** _____

Sole Owner Partnership Corporation LLC

Business Name _____ D.B.A. _____

Business Address _____ City & Zip _____

Mailing Address _____ City & Zip _____

Business Tax Certificate # _____

LIST ALL FICTITIOUS NAMES THE BUSINESS WILL OPERATE OR ADVERTISE UNDER:

	FICTITIOUS NAME	PHONE #
1		
2		
3		
4		

IF APPLICANT IS A CORPORATION:

NAME OF CORPORATION AS SHOWN IN ARTICLES OF INCORPORATION OR CHARTER	DATE OF INCORPORATION	STATE OF INCORPORATION

NAMES AND RESIDENCE ADDRESSES OF EACH CURRENT CORPORATE OFFICER AND DIRECTOR:

NAME	RESIDENCE ADDRESS	TITLE
		PRESIDENT
		VICE PRESIDENT
		SECRETARY
		TREASURER

FOR OFFICE USE ONLY

DATE FILED: RECEIVED BY:		
DEVELOPMENT SERVICES – ZONING		FIRE & LIFE SAFETY DEPARTMENT
APPROVED BY: DATE: PHONE:		APPROVED BY: DATE: PHONE:
APPROVING OFFICER: _____		DATE: _____

IF PARTNERSHIP, LIST NAME AND RESIDENCE ADDRESS OF EACH PARTNER, INCLUDING LIMITED PARTNERS:

NAME	RESIDENCE ADDRESS	TITLE

LIST FULL TRUE NAME AND ANY OTHER NAMES USED BY THE OWNERS AND ANY PERSONS WHO EXERCISE CONTROL OVER THE OPERATION, MANAGEMENT, DIRECTION OR POLICY OF THE BUSINESS, OR WHO ARE RESPONSIBLE FOR THE DAILY OPERATION OF THE BUSINESS:

	FULL NAME	TITLE
1		
2		
3		
4		
5		

APPLICANT'S PREMISES ARE OWNED LEASED/RENTED

IF RENTED OR LEASED, PLEASE PROVIDE THE NAME AND ADDRESS OF THE PROPERTY OWNER(S):

PROPERTY OWNER'S NAME	PROPERTY OWNER'S ADDRESS	PHONE #

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APPLICANT'S SIGNATURE

DATE OF APPLICATION

RESPONSIBLE PERSON COMPLETING APPLICATION IF NOT APPLICANT - PRINT & SIGN

TITLE/POSITION

LIVE SCAN FINGERPRINT LOCATIONS FOR SAN DIEGO COUNTY

Other Locations: www.ag.ca.gov/fingerprints/publications/contact.htm

PLEASE READ FIRST

IT IS SUGGESTED THAT YOU CONTACT THE
LIVE SCAN PROVIDER LISTED, TO VERIFY THEIR CURRENT
HOURS/FEES

<p style="text-align: center;"><u>BONSALL</u> LSID N71 Bonsall Photo & Postal Ctr. 5256 S. Mission Road Suite #703 Bonsall, CA 92003 Contact: (760) 941-9221</p>	<p style="text-align: center;"><u>CARLSBAD</u> AAA Livescan on Grand 800 Grand Avenue #C9 Carlsbad, CA 92008 (760) 434-3533</p> <p style="text-align: center;">M-F (10am-5pm) Wlk Sat. Appt.</p>	<p style="text-align: center;"><u>CARLSBAD</u> Coastal I.D. 2911 State Street #K Carlsbad, CA 92008 (760) 434-5927</p> <p style="text-align: center;">M-F (9am-5pm) Wlk./Appt. Sat. (10am-2pm) Wlk./Appt.</p>	<p style="text-align: center;"><u>CHULA VISTA</u> Chula Vista Police Dept. 315 F Street Chula Vista, CA 92010 (619) 691-5137</p> <p style="text-align: center;">M-F (8am-12pm) Appt. only M-F (1pm-4pm) Appt. only</p>
<p style="text-align: center;"><u>CHULA VISTA</u> Qwik Prints 629 3rd Ave #K-1 Chula Vista, CA 91910 (619) 585-0022</p> <p style="text-align: center;">M-Th (9am-6pm) Appt. M-Th (10am-5pm) Wlk. F (9am-4pm) Appt. F (10am-3pm) Wlk.</p>	<p style="text-align: center;"><u>EL CAJON</u> El Cajon Police Dept. 100 Fletcher Parkway El Cajon, CA 92020 (619) 579-3362</p> <p style="text-align: center;">M,W,F (1:30pm-4:30pm) Appt. Call for Scheduling</p>	<p style="text-align: center;"><u>EL CAJON</u> Live Scan of San Diego 450 Fletcher Parkway #207 El Cajon, CA 92020 (619) 631-7535</p> <p style="text-align: center;">M-F (9am-6pm) Appt. only M-F (10am-5pm) Wlk. Sat (12pm-4pm) Appt. only Call for Appointments</p>	<p style="text-align: center;"><u>EL CAJON</u> Excell Security, Inc. 700 North Johnson Ave #C El Cajon, CA 92020 (619) 275-5828</p> <p style="text-align: center;">M-F (9am-4pm) Appt. only Call for Appointments</p>
<p style="text-align: center;"><u>ENCINITAS</u> Internetbiz 2033 San Elijo Avenue #254 Encinitas, CA 92007 (760) 809-1582</p> <p style="text-align: center;">7 days per week (7am-9pm) Appt. Only</p>	<p style="text-align: center;"><u>ESCONDIDO</u> LSID 689 Escondido Police Dept. 700 West Grand Avenue Escondido, CA 92025 Contact: (760) 839-4431</p> <p style="text-align: center;">M-F (9:00am-3:30pm) Appt.</p>	<p style="text-align: center;"><u>ESCONDIDO</u> A LiveScan of CA Affiliate 243 S Escondido Blvd Escondido, CA (760) 741-7639</p> <p style="text-align: center;">M-F (8:30am-6pm) Wlk. Sat (9am-1pm) Appt. Only</p>	<p style="text-align: center;"><u>ESCONDIDO</u> Escondido Live Scan 332 S. Juniper St #207 Escondido, CA 92025 (760) 546-5400</p> <p style="text-align: center;">M-F (9am-6pm) Appt. only Sat. (10am-5pm) Appt. only</p>
<p style="text-align: center;"><u>LA JOLLA</u> UCSD Police Dept 9500 Gillman Dr #500 La Jolla, CA 92093 (858) 534-4361 (appointments) (858) 822-2000 (directions)</p> <p style="text-align: center;">M-F (9am-3pm) Appt. Closed Holidays</p>	<p style="text-align: center;"><u>LA MESA</u> Access Fingerprinting 7171 Alvarado La Mesa, CA 91941 (909) 390-6677</p> <p style="text-align: center;">M-F (9am-5pm) Wlk.</p>	<p style="text-align: center;"><u>LA MESA</u> La Mesa Police Dept 6119 Lake Murray Blvd La Mesa, CA 91942 (619) 667-1342</p> <p style="text-align: center;">M-Th (10am-2pm) Appt./Wlk. F (12pm-3pm) Appt./Wlk. S (10am-2pm) Appt. Appointments are Priority</p>	<p style="text-align: center;"><u>NATIONAL CITY</u> Finger Print Impressions Live Scan South Bay 550 E 8th Street. Ste #8 National City, CA 91950 (619) 434-7458</p> <p style="text-align: center;">M-Th (10am-6pm) Appt./Wlk. M- Th (3pm-6pm) Wlk. F (9am-3pm) Appt. Sat – Appt. Only</p>

**IT IS SUGGESTED THAT YOU CONTACT THE
 LIVE SCAN PROVIDER TO VERIFY THEIR CURRENT HOURS/FEEES**

<p><u>RANCHO BERNARDO</u> Identification Services 16935 West Bernardo Dr #122 Rancho Bernardo, CA 92127 (858) 592-7714/(858) 442-4306 M-F (9am-5pm) Appt. Only</p>	<p><u>SAN DIEGO</u> Access Fingerprinting Services 8316 Clairemont Mesa Blvd Ste. 211 San Diego, CA 92111 (866) 774-6850 M-F (9am-5pm) Wlk. Hard Cards Also</p>	<p><u>SAN DIEGO</u> Advance Live Scan 2859 El Cajon Blvd #2-A San Diego, CA 92104 (619) 250-3282 M-F (9am-3pm) Appt./Wlk</p>	<p><u>SAN DIEGO</u> EZ Livescan 3200 Adams Ave #209 San Diego, CA 92116 (619) 283-7939 M-F (9am-5pm)</p>
<p><u>SAN DIEGO</u> San Diego USD Police Services/EOC Bldg 4100 Normal St San Diego, CA 92103-2682 (619) 725-7015 (appt) (619) 725-7014 (directions) M (2:00am-4:00pm) Appt. only M (8:30am-1:00pm) Wlk. T-F(8:30am-1:00pm) Wlk. T-F(2:00pm-4:00pm) Appt. only</p>	<p><u>SAN DIEGO</u> Global Livescan 9666 Business Park Av#112 San Diego, CA 92131 (800) 894-2022 M-F (9am-4:30am) Appt./ Wlk.</p>	<p><u>SAN DIEGO</u> Heritage Security 1260 Morena Blvd Ste #200 San Diego, CA 92110 (619) 275-7000 M-F (9am-4pm) Appt.</p>	<p><u>SAN DIEGO</u> Identix ID Services 3333 Camino Del Rio S # 310 7575 Metropolitan Dr #110 San Diego, CA 92108 (800) 315-4507 M-F (9am-3:30pm) Appt.</p>
<p><u>SAN DIEGO</u> Millenia Security Services 4797 Mercury St #A San Diego, CA 92111 (858) 576-1994 M-F (9am-4pm) Appt. only</p>	<p><u>SAN DIEGO</u> San Diego State University 5500 Campanile Dr SSE-1410 San Diego, CA 92182 (619) 594-3193 M-F (8am-3:30pm) Appt.</p>	<p><u>SAN DIEGO</u> San Diego County Office of Education 6401 Linda Vista Rd Rm #104 San Diego, CA 92111 (858) 569-5420 M-F (7am-4pm) Appt. only No Walk Ins</p>	<p><u>SAN MARCOS</u> Identix ID Services 150 Valpreda Rd #201 San Marcos, CA 92069 (800) 315-4507 M-F (8am-3pm) Appt.</p>
<p><u>SAN MARCOS</u> Live Scan of San Marcos 500 W. San Marcos Bl. #102 San Marcos, CA 92069 (760) 752-1072 M-F (9am-4pm) Wlk. Sat (9am-2pm) Wlk.</p>	<p><u>SANTEE</u> LSID K19 Health Educational Consultants 9255-353 Magnolia Avenue Santee, CA 92071 Contact: (619) 448-8448 or Cell: (619) 884-9301 M-F Appt. only</p>		

REQUEST FOR LIVE SCAN SERVICE

Applicant Submission

ORI: CA0371100 Type of Application: Permits/Licensing
Code assigned by DOJ

Job Title or Type of License, Certification or Permit: Massage Industry

Agency Address Set Contributing Agency:

San Diego Police Department 08228
Agency authorized to receive criminal history information Mail Code (five digit code assigned by DOJ)
P.O. Box 121431 M/S 735
Street No. Street or P.O. Box Contact Name (Mandatory for all school submissions)
San Diego, CA 92112-1431 (619) 531-2250
City State Zip Code Contact Telephone No.

Name of Applicant: _____
(please print) Last First MI

Alias: _____ Driver's License No. _____
Last First

Date of Birth: _____ Sex: Male Female Misc. No. BIL - Applicant to Pay
Agency Billing Number

Height: _____ Weight: _____ Misc. No: _____

Eye Color: _____ Hair Color: _____ Home Address: _____
Street or P.O. Box

Place of Birth: _____
City, State and Zip Code

SOC: _____

Your Number: _____ Level of Service DOJ FBI
OCA No. (Agency Identifying No.)

If resubmission, list Original ATI No. _____

~~Employer (Additional response for agencies specified by statute)~~

~~Employer Name~~

~~Street No. Street or P.O. Box Mail Code (five digit code assigned by DOJ)~~

~~City State Zip Code Agency Telephone No. (optional)~~

Live Scan Transaction Completed By: _____ Date: _____
Name of Operator

Transmitting Agency _____ ATI No. _____ Amount Collected/Billed _____

Business Establishments in the State of California

**Excerpt from: UNLAWFUL DISCRIMINATION
Your Rights and Remedies
Civil Rights Handbook
August 2001
Third Edition
California Attorney General's Office
page 45**

CHAPTER IV

PUBLIC ACCOMMODATIONS, BUSINESSES AND SERVICES

The Unruh Civil Rights Act

The Unruh Civil Rights Act⁷⁶, or Unruh Act, as discussed in the housing chapter of this publication, applies to all business establishments of every kind whatsoever which provide services, goods, or accommodations to the public. Businesses subject to the Unruh Act include bookstores, gymnasiums, shopping centers, mobile home parks, bars and restaurants, schools, medical and dental offices, hotels and motels, and condominium homeowners associations.⁷⁷ The Unruh Act prohibits all types of arbitrary discrimination, and not just discrimination based on sex, race, color, religion, ancestry, national origin, age, disability or medical condition.⁷⁸ The Unruh Act also prohibits discrimination based on personal characteristics, geographical origin, physical attributes, and individual beliefs. For example, the arbitrary exclusion of individuals from a restaurant based on their sexual orientation is prohibited.⁷⁹

You can pursue an Unruh Act claim by filling a verified complaint with the Department of Fair Employment and Housing (DFEH) or a private lawsuit. If a business establishment is engaging in a pattern or practice of discrimination, you can refer the matter to the Attorney General's Office or to your local district or city attorney. Please refer to the housing chapter of this publication for the procedures to follow and remedies available in redressing your claim for public accommodation's violation of the Unruh Act.

State Licensed Individual or Entity in the State of California

Excerpt from: UNLAWFUL DISCRIMINATION
Your Rights and Remedies
Civil Rights Handbook
August 2001
Third Edition
California Attorney General's Office
pages 50-51

Protection Against Discrimination by Persons Licensed to Render Services

Business and Professions Code section 125.6 provides that any person who holds a license pursuant to the Business and Professions Code⁸⁷ is subject to disciplinary action if that person discriminates

⁸⁷ Professions and vocations covered include physicians, surgeons, chiropractors, dentists, dental hygienists, clinical laboratory technologists and bioanalysts, podiatrists, midwives, physical therapists, speech pathologists, optometrists, dispensing opticians, nurses, psychologists, hearing aid dispensers, pharmacists, psychiatric technicians, veterinarians, accountants, outdoor advertisers, architects, attorneys, barbers, engineers, collection agencies, building contractors, those engaged in the selling or hiring of guide dogs, cosmetologists, private detectives, funeral directors, cemeteries, embalmers, geologists and geophysicists, shorthand reporters, structural pest control operators, social workers, construction inspectors, dry cleaners, electronic and appliance repairers, automobile mechanics, tax reporters, real estate brokers and salespersons, and holders of most liquor licenses.

in, restricts the performance of, or refuses to perform the licensed activity because of a consumer's race, color, sex, religion, ancestry, disability, marital status, or national origin.

In addition, Business and Professions Code section 726 bars the commission of any act of sexual abuse, misconduct, or relations with a patient, client, or customer constitutes unprofessional conduct and grounds for disciplinary action for persons holding certain professional licenses.

Moreover, Business and Professions Code section 23438 prohibits certain private clubs and organizations which hold liquor licenses from discriminating against certain groups. It also provides that expenditures at restrictive clubs are not tax-deductible.⁸⁸

If you believe you have been discriminated against by a state-licensed individual or entity, you should file a complaint with the state licensing board which regulates the profession, vocation, or business involved. For information regarding what board has jurisdiction over a particular licensee contact:

California Department of Consumer Affairs
401 R Street
Sacramento, CA 95814

Telephone: (800) 952-5210

TDD: (916) 322-1700

Web Site: www.dca.ca.gov

What is a Scope of Practice?

In massage schools and classes we often are cautioned to "work within our scope of practice". But what does this really mean in a state like California?

Scope of practice refers to the range of services a profession provides. In a state licensed profession, the law generally states what the person can do. Typically, there are three components to scope of practice in law: intention, or objective, skills used, and tools. Objectives of massage include stress management, injury rehabilitation, and enhancing well-being. Skills include touch, movement, education. Tools or modalities include the use of stroking, compression, friction, heat, cold, stretching, and breathwork.

Licensing laws usually have some limits and exemptions. Despite this, most complaints made of a profession infringing on another's scope are made by one licensed profession against another. An example would be a chiropractor complaining that a physical therapist's "joint mobilization" technique is actually exclusive to chiropractic.

Unlicensed professions create their own scope of practice by what is generally taught in schools and is done in the field, and is not exclusive to another profession. A legal scope of practice, by definition, is established by law, usually at the state level.

Having no legally defined scope of practice has both its pros and cons for the profession. There is no state massage law defining or limiting what we do. We do need to watch out for infringement on other professions' scopes, but that would be the case even if licensed. Some massage therapists believe this has contributed to the tremendous creativity and diversity seen in this field. State law might be established that restricts massage only to relaxation, or only to treatment.

The negative is that a license would at least protect our right to provide certain services. So when the Maryland Physical Therapy Board claimed a number of years ago that massage therapists could not use the terms "therapy" or "therapeutic" there was no protection for the massage profession. Massage therapists in Maryland sued, but eventually won the right to perform "therapeutic" massage through a state law. However, they ended up agreeing to require new massage therapists to have two years of col-

lege beginning in a few years.

Following I will summarize the scopes of several related professions.

Medicine: Under Business & Professions Section 2052, physicians are granted an extremely broad scope of practice. "Any person who practices or attempts to practice, or who advertises or holds himself or herself out as practicing, any system or mode of treating the sick or afflicted in this state, or who diagnoses, treats, operates for, or prescribes for any ailment, blemish, deformity, disease, disfigurement, disorder, injury, or other physical or mental condition of any person, without having at the time of so doing a valid, unrevoked, or unsuspended certificate as provided in this chapter, or without being authorized to perform such act pursuant to a certificate obtained in accordance with some other provision of law, is guilty of a misdemeanor." In this definition, the purpose is to diagnose or treat; the modality is "the mode or practice of treating".

Section 2620: Physical therapy means the art and science of physical or corrective rehabilitation or of physical or corrective treatment (purpose) of any bodily or mental condition of any person by the use of the physical, chemical, and other properties of heat, light, water, electricity, sound, massage, and active, passive, and resistive exercise (modalities), and shall include physical therapy evaluation, treatment planning, instruction and consultative services (skills).

Later the law clarifies that it does not restrict those allowed to perform such services under other state law. It also defines physical therapy aides and the continuous on site supervision required by the physical therapist.

Exemption for massage therapists is somewhat vaguely given by the following: "The administration of massage, external baths, or normal exercise not a part of a physical therapy treatment shall not be prohibited by this section."

Section 4937 defines acupuncture. An acupuncturist's license authorizes the holder thereof:

(a) To engage in the practice of acupuncture.

(b) To perform or prescribe the use of oriental massage, acupressure, breathing techniques, exercise, or nutrition, including the incorporation of drugless substances and herbs as dietary supplements to promote health. Nothing in this section prohibits any person who does not possess an acupuncturist's license or another license as a healing arts practition-

er from performing, or prescribing the use of, oriental massage, breathing techniques, exercises, or nutrition to promote health, so long as those activities are not performed or prescribed in connection with the practice of acupuncture.

Notice that this law clearly allows others to perform massage as long as it is not part of the acupuncture session, similar to the physical therapy law.

Massage also is found in the scope of practice of cosmetology, as seen in the following:

(b) The practice of cosmetology is all or any combination of the following practices:

(1) Arranging, dressing, curling, waving, machineless permanent waving, permanent waving, cleansing, cutting, shampooing, relaxing, singeing, bleaching, tinting, coloring, straightening, dyeing, applying hair tonics to, beautifying, or otherwise treating by any means, the hair of any person.

(2) Massaging, cleaning or stimulating the scalp, face, neck, arms, or upper part of the human body, by means of the hands, devices, apparatus or appliances, with or without the use of cosmetic preparations, antiseptics, tonics, lotions, or creams.

Under Title 16, Section 302, chiropractors are granted a rather large scope of practice, including to manipulate and adjust the spinal column and other joints and in the process the related muscle and connective tissue. As part of their treatment they can use all necessary mechanical, hygienic and sanitary measures, including air, cold, diet, exercise, heat, light, massage, physical culture, rest, ultrasounds, water and physical therapy techniques. They can treat and diagnose so long as it is consistent with chiropractic methods and techniques. Other provisions limit their scope, such as restricting use of x-rays and thermography to diagnosis and not treatment, and using the term "physical therapy" in advertising. So while a chiropractor can perform physical therapy techniques, they cannot advertise them.

The bottom line of all this is that we should all work within our training and level of skill. Be sure that classes you take are within the generally expected boundaries of the profession and do not cover techniques granted exclusively to another profession (such as the insertion of needles or chiropractic adjustments).

Beverly May
Director of Governmental Relations



Why Support or Oppose Massage Regulation in CA?

by Beverly May, GR Chair

In the next several issues of California Currents, I will address responses to the above question. I want to begin by re-defining the types of professional regulations which exist.

1) LICENSURE

A licensure law refers to a statute in which a particular occupational group is given an exclusive scope of practice, with penalties prescribed for its violation, except for those which may be exempted. Licensure requires proof of a particular level of education, and the completion of certain other requirements, such as a test. Licensure laws generally include both practice and title regulation, but may have only one feature.

A "practice act" defines the scope of practice of the profession, and says that unless exempted by some defined provision, anyone practicing the work of this profession must be licensed under the law, even if they call their work by some other name.

Provisions regulating the "title" require that in order to use certain specified titles, such as "massage therapist", "licensed massage therapist", "bodyworker", etc., one must have the required license, advertise one's work.

License laws define whether the professional can work independently or must be supervised. Doctors and physical therapists are independent. Dental hygienists must work under the supervision of a licensed dentist. When we speak of independent professional recognition, we mean the ability to work unsupervised as a distinct profession.

2) CERTIFICATION

A) Governmental certification law regulates and protects only titled practitioners who are "state certified". This certification may be voluntary, allowing other massage/bodywork and/or somatic practice professionals to continue to practice while at the same time acknowledging a particular group's education by granting them the title of "Certified" upon evidence of meeting certain

qualifying standards. Generally these laws are "title acts", as defined above. At times people have chosen voluntary certification because they thought it would be less threatening to those already practicing and to existing licensed professions than a full licensure bill. However, experience has shown that people who are not in favor of massage therapy licensure often may resist regulation of any kind.

B) Private certification means that a person has successfully fulfilled privately defined education standards for a private occupational association, school or other private institution. One kind of private certification offers use of a trademarked name, generally after having fulfilled the requirements of a private certification. This certification has no legal status unless accorded under other provisions of law.

C) In Private/Governmental or Certification By Reference the government simply adopts or accepts the standards of a private occupational association "by reference". Thus the association's standards acquire the force of law. The scope of practice may or may not be specifically delineated, but practice may be restricted by statutory or regulatory requirements which make reference to the occupation. Many states which license massage have adopted a private certification exam, such as the National Certification Exam for Therapeutic Massage & Bodywork (NCETMB), making this private exam governmental by reference.

D) Approval of Certifying Agencies: A final means of regulating professions privately is through commissions which approve or accredit programs.

1. Accreditation (of schools or educational programs) - accredited schools are more likely to be able to offer financial aid to students. This is different than the status in California, where the state approves massage schools to issue certificates of completion (diplomas).

2. Approval of certifying bodies — an example is the National Commission on Certifying Agencies (NCCA), which sets standards for certification exams to assure their validity, reliability and fairness. The NCETMB has been approved by the NCCA.

Agencies such as these have gained enough respect and recognition that state

and federal governments are much more likely to accept approved programs as the basis for licensure, reimbursement, and access to hospital employment. It should be noted however that few national certification exams have actually been approved by NCCA.

3) REGISTRATION

Registration refers to an administrative record keeping system which requires persons who perform certain activities or hold themselves out as members of a given occupational group, to register with the state. The meaning of Registration can vary from state to state. In some states the scope of practice or use of the title is exclusive to the extent that registration is required; for example, an unregistered person usually may not practice. In other states, one may practice and even call themselves by a certain title, i.e., "Massage Therapist", so long as they do not portray themselves to the public as "Registered". Registration can be private but most often is governmental. If the latter, usually registration is mandatory (in the manner of a licensure practice act) in order to legally practice and use the title.

Registration is often an attractive alternative to legislators because it usually does not require the appointment of a separate licensing board.

Please send responses to the question "Why do you support/oppose state regulation of massage in California" to me at either beverlysmay@home.com or Beverly May, 919 North Rd. Belmont, CA 94002 🙌

AMTA Foundation Website

Find it at:

www.amtamassage.org/foundation/home.htm

There is information about the Foundation, its Board, its staff, donors, programs, grant applications, grant recipients, projects, research, fund-raising and much, much more!

NEGOTIATING CONTRACTS

This information may also be helpful during a hiring interview as a checklist for reviewing the important aspects of the Job.

These are guidelines for writing an independent contractor agreement. This list of suggestions does not constitute legal advice and should not be a substitute for professional legal services. In all cases, it is wise to seek approval of any contractual agreements with an attorney.

- 1) PAYMENT: clearly define employee vs. independent contractor, will you be paid at an hourly rate or a percentage of income generated, who collects client payments.
- 2) PAYCHECK: how often, paid in full (or wait for insurance payment?), tips included in paycheck or paid out immediately.
- 3) REFERRAL FEES: rewards for referring clients to the business.
- 4) BUSINESS CARDS: can you use your own personal ones, or have your name and title put on theirs? who pays for these.
- 5) LENGTH OF SESSIONS: types of sessions you will provide, time in between sessions, scheduling availability, who will book sessions, how much notice will you receive regarding bookings, set hours or on-call, on premises during scheduled hours or come in when booked only.
- 6) OFFICE USE: phone usage, water, keys, equipment, towels, copy machine, computer, storage, visitors.
- 7) EXTRA JOBS: are you required/expected to do anything other than massage: cleaning, laundry, filing, bookkeeping, collect fees, book clients, answer phones, etc.
- 8) WHO PROVIDES WHAT: massage table, lotion, oil, linens, bolsters, chair/stool, heat source, fan, music, lighting, clock, receptionist, etc.
- 9) INSURANCE: malpractice insurance, business (fire, theft, liability) insurance; amount required.

10) RECORD KEEPING: do you keep your own set of records and/or an office set.

11) NO SHOW: policy and payment in the case of client no show's.

12) OFFICE POLICIES: eating area, dress code, waiting room, trades for services, free to employees, kids in the office.

13) BUSINESS PROMOTIONS: amount of time you are expected to participate in promotions, will you be paid or are these free, are you expected to refer in a certain number of clients to the business.

14) DISCOUNTS & SPECIALS: promotional pricing for services, who loses the pay: you or the business, are there any family benefits for services, discounts on products sold by the business.

15) DISTRIBUTIONS: can you give out to clients - exercise handouts, health information, educational handouts, product samples, etc. Who will provide these?

16) PRIVATE CLIENTS: how will this be handled, courtesy to check with employer prior to either seeing personal clients in office or working with a client outside of office.

17) LENGTH OF CONTRACT: how long is it in effect, guidelines for termination.

18) COMPETITION CLAUSE: working for competitors - acceptable or not.

19) DISPUTE CLAUSE: in the case of a dispute, what are your rights, options.

STATE/PROVINCE	CONTACT	TITLE/TYPE OF CREDENTIAL	REQUIRED EDUCATION/EXAMS	NCETMB* USED	RENEWAL FEE	CEUS REQUIRED
ALABAMA	www.cmbd.state.al.us 334-269-9990	Massage Therapist/License	650hr/Written	Yes	\$100/2yr	16/2yr
ARIZONA	http://massageboard.az.gov 602-542-8604	Massage Therapist/License	500hr/Written	Yes	\$180/2yr	25/2yr
ARKANSAS	www.arkansasmassage.com 501-623-0444	Massage Therapist/License Master Massage/Therapist/Instructor	500hr/Written	Yes	\$30/yr	6/yr
CALIFORNIA	www.californiamassage.com	N/A	Freedom of Access	No	N/A	N/A
CONNECTICUT	www.ctph.state.ct.us 860-509-8375	Massage Therapist/License	500hr/Written	Yes	\$200/yr	24/4yr
DELAWARE	www.professionalmassage.state.de.us 800-464-4357	Massage Technician/Certification Massage Therapist/License	300hr/CMT 500hr/LMT/Written	Yes	\$123/2yr	12/2yr 24/2yr
FLORIDA	www.doh.state.fl.us 850-245-4161	Massage Therapist/License	500hr/Written	Yes	\$155/2yr	24/2yr + course RWIADS
HAWAII	www.hawaii.gov 808-986-2604	Massage Therapist/License Massage Apprentice/Permit	570hr/Written	No	\$120/2yr	No
IDAHO	N/A	N/A	Freedom of Access	No	N/A	N/A
ILLINOIS	www.idpr.com 217-782-8556	Massage Therapist/License	500hr/Written	Yes	\$175/2yr	24/2yr
IOWA	www.iph.state.ia.us 515-281-6959	Massage Therapist/License	500hr/Written	Yes	\$60/2yr	24/2yr
KENTUCKY	http://finance.ky.gov 502-564-3296 x240	Massage Therapist/License	600hr/Written	Yes	\$100/2yr	24/2yr
LOUISIANA	www.lmbt.org 225-771-4090	Massage Therapist/License	500hr/Written & Oral	Yes	\$125/yr	12/yr
MAINE	www.maine.gov 207-624-8613	Massage Therapist/License	500hr	Yes	\$25/yr	No
MARYLAND	www.mdmassage.org 410-764-4738	Massage Therapist/Registry Massage Therapist/Certification	500hr/RMT/Written 500hr+60 college credits/CMT/Written	Yes or NCCAOM	\$200/2yr	24/2yr
MINNESOTA	800-657-3957	N/A	Freedom of Access	No	N/A	N/A
MISSISSIPPI	www.msmt.state.ms.us 601-856-6127	Massage Therapist/Registered	700hr/Written	Yes	\$192/2yr	24/yr
MISSOURI	http://mzmo.gov/massage.asp 573-522-6277	Massage Therapist/License	500hr/Written	Yes	\$200/2yr	12/2yr
NEBRASKA	www.nhs.state.ne.us 402-471-2117	Massage Therapist/License	1,000hr/Written	Yes	\$27/2yr	24/2yr
NEW HAMPSHIRE	www.dhs.nh.gov 603-271-0277	Massage Therapist/License	750hr/Written & Practical	Yes	\$100/2yr	12/2yr
NEW JERSEY	www.njstate.nj.us 973-904-6430	Massage Therapist/Certification	500hr or Written	Yes or NCCAOM	\$120/2yr	20/2yr
NEW MEXICO	www.rid.state.nm.us 505-476-4870	Massage Therapist/License	650hr/Written	Yes	\$125/2yr	16/2yr
NEW YORK	www.op.nysed.gov/massage 518-474-3817 x150	Massage Therapist/License	1,000hr/Written	No	\$55/3yr	No
NORTH CAROLINA	www.lmbt.org 919-546-0050	Massage and Bodywork/License	500hr/Written	Yes	\$100/2yr	25/2yr
NORTH DAKOTA	www.ndboardofmassage.com 701-872-4895	Massage Therapist/License	750hr/Written & Practical	Yes	\$50/yr	18/yr
OHIO	http://med.ohio.gov 614-728-3674	Massage Therapist/License	750hr/Written	No	\$50/2yr	No
OREGON	www.oregonmassage.org 503-265-8657	Massage Therapist/License	500hr/Written & Practical	Yes	\$100/2yr	25/2yr
RHODE ISLAND	www.health.state.ri.us/hr 401-222-2828	Massage Therapist/License	500hr/Written	Yes	\$37.50/yr	No
SOUTH CAROLINA	www.lbr.state.sc.us 803-896-4480	Massage Therapist/License	500hr/Written	Yes	\$175/2yr	12/2yr
SOUTH DAKOTA	www.state.sd.us/doh/massage 605-224-8803	Massage Therapist/License	500hr	Yes	N/A	N/A
TENNESSEE	www.state.tn.us/health 800-778-4123	Massage Therapist/License	500hr/Written	Yes	\$100/2yr	25/2yr
TEXAS	www.dhs.state.tx.us/massage 512-834-6616	Massage Therapist/License	250hr+50hr Internship Written & Practical	No	\$106/2yr	12/2yr
UTAH	www.udpr.utah.gov 801-530-6628	Massage Therapist/License Massage Therapist/Apprentice	600hr/LMT 1,000hr/Written & Practical/AMT	Yes	\$52/2yr	No
VIRGINIA	www.dhp.virginia.gov 804-662-9949	Massage Therapist/Certification	500hr/Written	Yes	\$70/2yr	25/2yr
WASHINGTON	www.doh.wa.gov 360-236-4700	Massage Practitioner/License	500hr/Written	Yes	\$10/yr	16/2yr
WASHINGTON, D.C.	http://doh.dc.gov 877-374-1157	Massage Therapist /License	500hr/Written	Yes	\$111/2yr	12/2yr
WEST VIRGINIA	www.wvmessage.org 304-457-1400	Massage Therapist/License Reciprocal LMT	500hr	Yes	\$100/2yr	25/2yr
WISCONSIN	http://doh.wis.gov 608-266-0145	Massage Therapist/Certification	600hr/Written	Yes	\$53/2yr	No
BRITISH COLUMBIA	www.cmbc.bc.ca 604-736-3404	Massage Therapist/Registration	3,000hr/Written & Practical	No	CAN \$330/yr	24/2yr
NEW FOUNDLAND/ LABRADOR	www.lmbt.ca 709-739-7181	Massage Therapist/Registration	2,200hr/Written & Practical	No	\$300/3yr	30/3yr
ONTARIO	www.ontario.ca 416-889-2626	Massage Therapist/Registration	2-3 yrs Full Time/Written & Practical	No	CAN \$425/yr	30/3yr

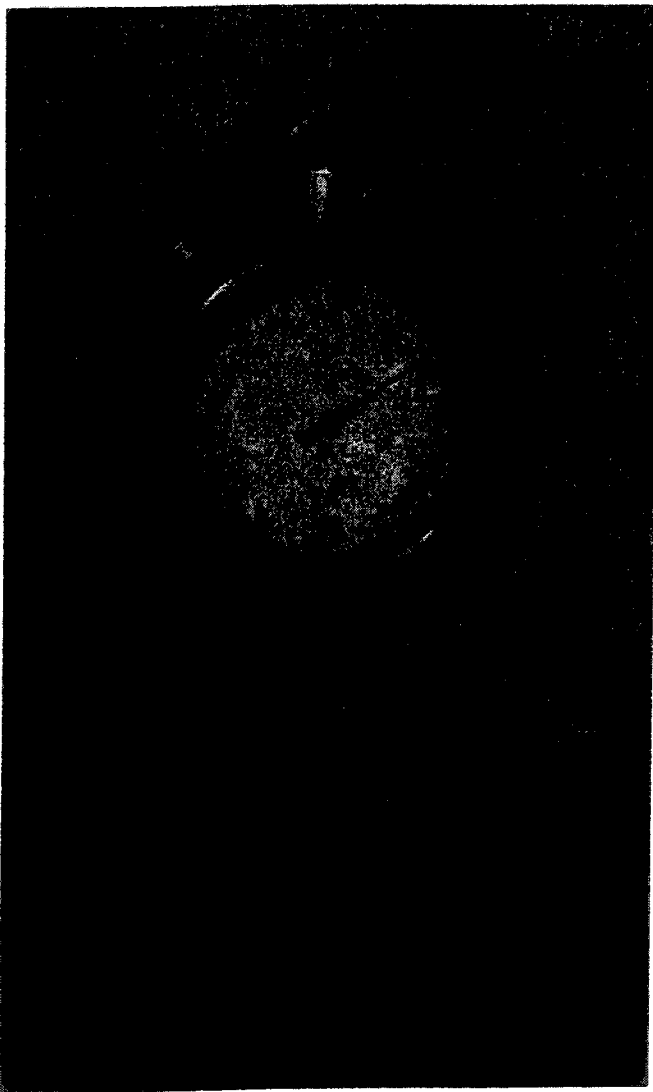
* National Certification Examination for Therapeutic Massage and Bodywork



How To Handle "No Shows"

These suggestions can help you be more effective in ethically managing clients who push your scheduling and time management limits.

BY DIANNE POLSENO



Dealing with clients who are late, or who do not show up for a scheduled appointment, are two of the most common issues raised for discussion in my ethics workshops. Because these situations present us with the awkwardness of confrontation, and the challenges of effective communication and limit-setting, we may choose to "let it go," say nothing to our clients, and hope the problem will go away in time. Eventually, if the problem

continues, we can become frustrated, resentful and feel taken advantage of by the client. And if we are not effectively dealing with the situation, we may even grow to dread seeing the client's name in our appointment book.

The recommendations offered here are ideas and solutions that I have compiled from the experiences of my own practice, and from those of many massage therapists I have met over the years. They can help you be more effective in ethically managing clients who push your scheduling and time management limits.

Establish A Reasonable Policy

It's easier to start fresh with healthy habits than to change old ones that don't work. So, if you are a new graduate setting up your business, this is an ideal time to establish and begin enforcing your policies. It's also easier to implement a policy with a new client you hardly know than to con-

front a client who has been coming to you for many years. However, even if you are a seasoned practitioner or are working with a well-known client, it's never too late to set limits by implementing a new policy for lates and no shows.

To determine what parameters are reasonable for your practice, consider the policies of other business professionals who operate on an appointment-only basis, and ask yourself if you would be willing to abide by those same policies. Twenty-four-hours notice seems to be a typical requirement for cancellations, but if you would be unwilling to pay for a missed appointment that you canceled within 12 hours, that may not be the best policy to adopt as your own. It's unfair to expect clients to do something that you would find unreasonable if you were in their position.

The reverse is also true: It is fair and reasonable to request that clients do what you are amenable to. For example, if you are willing to forfeit the amount of time you were late out of the appointment time, offer the same option to your clients instead of making them reschedule, even if they arrive 30 minutes late.

Another characteristic of a reasonable policy is that it would be practical for you to enforce. A no-show client who doesn't call to reschedule isn't likely to pay a bill you send them for the missed appointment, so billing for no shows in these instances can be costly and futile. A more effective policy may be to keep a record of clients who miss their appointments. Inform them when they call to reschedule that, if they wish to make any future appointments with you, they must pay your cancellation fee. Don't waste your time or postage expenses chasing after a lost cause.

Your policy may be that the amount a client must pay you for late cancella-

tions or no shows is the same amount you charge for a treatment. Or, you may decide that half your fee or another rate is more acceptable for your practice. There are no set rules for this aspect of ethical business practices, but it is important that you are realistic, reasonable and willing to follow the policy yourself.

In my own practice, I require a minimum of five hours for cancellations. It seems reasonable and practical for my clients, since I usually see them in the evening hours, and they may not know they aren't feeling well enough to come to the appointment until they wake up that morning. This still gives me enough time to fill appointments that become available from my waiting list, and even if I can't fill the slot, I have enough notice about the unexpected free time in my schedule to plan other things. For lateness, I offer clients the options of being worked on for the remaining time of the appointment for my regular fee, or they may pay me for additional time to make their treatment last the full hour, providing that I have the extra time available for them.

Displaying your policy is important. Put it on your business and appointment cards, post it in your office, and include it in your welcome packets for new clients. Simple wording, such as, "To avoid paying for missed appointments, a cancellation notice of _____ hours is required for all clients" works well to

inform clients that you are a conscientious businessperson, and that no client is exempt from having to take responsibility for appointments he or she can't keep. For your lateness policy, it is usually sufficient to include the information in your introduction literature or welcome packet. Verbalizing both policies to first-time clients also is recommended, in case they aren't information readers.

Make Reminder Contacts

Taking a few minutes to contact your clients a day or two before your scheduled workday can save many hours that might be lost due to client lateness or no shows. You might say, "I'm calling to confirm your appointment at _____ tomorrow," and, if they aren't home, leave a message on their answering machine along with a request that they call you if they can't make it. Adding, "To avoid paying a cancellation fee, please give a minimum of _____ hours notice if you can't make it," will reinforce your policy with clients each time you call to confirm.

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Also, now that many people have cell phones, they have more ways to be reached. E-mailing a reminder is another option. To make the most out of this, ask the client which method of reaching him or her is most convenient and effective.

Handle Situations As Soon As They Arise

The longer you leave unacceptable situations unresolved, the more difficult it can be to address them appropriately. Even if you eventually confront them, your actions may come from a place of anger and frustration and not from a clear, grounded practice of professionalism.

If clients are late, as soon as they arrive for the appointment, an appropriate response is to kindly inform them that the session time has been reduced by the amount of late time; ask them where you should focus your work for the time they have left; and charge them your normal fee for a full appointment. A simple statement, such as, "Unfortunately, we only have ___ minutes left to the ses-

sion. What areas would you like the focus to be on?" To try to absorb the client's lateness by running behind in your schedule is to work at your own expense, not to mention the expense of the clients who may have to wait for you because you are now late for subsequent appointments.

In cases where clients do not show for an appointment, calling them 15 minutes after the expected arrival time may help you know if they are delayed or not showing up at all. If your attempts to reach them fail, leave a message for them to contact you and remind them that if they want to reschedule with you, a cancellation fee must be paid.

With these suggestions, you can avoid carrying around the stressful baggage of unresolved issues throughout your day, and you have fewer messes to clean up when the day is done.

Have A "Flexible Backbone" When Enforcing Your Policy

Policies for lates and no shows are useless if they aren't enforced. Under "Suggestions for future workshops" on

a recent ethics course evaluation, one participant wrote, "Please have a course on how to grow a backbone!"

Having a backbone in business affairs means being able to set limits, make boundaries, and act in our own best interest when dealing with our clients. Just as our anatomical spine needs both stability and mobility, we must be both

strong and bendable when dealing with lates and no shows.

A flexible backbone gives us the courage, strength and ability to speak up and carry out our policies without being rigid, harsh or close-minded. It allows us to be simultaneously forthright and compassionate, to know when to persist to take care of ourselves, and when to accept the client's explanation and not charge the cancellation fee. It may take practice, but we usually can find a comfortable middle ground somewhere between the extremes of being a cold, impersonal businessperson and a doormat who can't act on his or her own behalf.

One way that I have found to stay flexible is to offer a client options, as noted above in how I deal with clients who show up late. Another example of this is if a client calls to cancel with less than five hours notice, I offer him or her the opportunity to find a client who is appropriate (both medically and ethically) for massage to take his or her place instead of paying my cancellation fee. This hasn't always worked out, but when it does, I have made a new client, the canceling client doesn't pay anything and everyone wins.

Summary

Handling business affairs can be tricky. It's never easier in the long run, though, to deal with lates and no shows by not dealing with them, thereby enabling our clients to act without due care and attention to their commitments to us. ■

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needs both stability and mobility,
we must be both strong and
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LATE CANCELLATIONS AND NO SHOWS

Have you ever been stood up? Is a client continually late? Does he or she wait until two hours before an appointment to cancel or just not show, only to call an hour later to apologize? What do you do? Do you have a cancellation/no show policy? Do you enforce it?

Most of us are very fortunate to have clients who appreciate our work, receive significant benefit from our ministrations as massage therapists, and who are very considerate of our time. It is difficult for many people on salary to understand that if we do not work, we do not get paid. As independent professional practitioners, we do not get sick leave, paid days off, vacation pay, and other benefits that many salaried workers receive as part of their pay package. Our situation is simple: no work, no pay!

I have a practice which, fortunately, is quite busy and is dominated by clients who come on a regular basis. A small portion of the appointment times are filled with "casual" appointments, that is, clients who are not on any kind of regular schedule.

For the first three years of my practice, there were not even two (yes, two!) last minute cancellations. Then, a new client, who was experiencing intense stress in her life, started coming on a regularly scheduled basis at a prime time in the late afternoon, several times a week. There was no problem for the first two months; but then the trouble started. Cancellations were

made just an hour or so before the appointment—there was a sale she could not pass up; someone needed to be picked up; she needed to meet with a client. What should I do? While the money was and is important, a more important consideration had to be evaluated. In most cases, there were other clients who wanted to come in that day, but my schedule was full and they had to be put off for another date or referred to another practitioner. For some that is fine, but for someone who has severe headache or sciatica, two days later does not help much.

In direct response to this one client, a "Cancellation/No Show" written policy was instituted. This written statement has been placed on the table in my lobby for all to see. In addition, a copy is given to each new client along with their receipt for payment and a notice of my office hours. I assure them that I know it will not be a problem with *them*, but they need to be aware of this policy, should they return for a massage in the future.

What does this written policy say? On my best stationary is printed:

Time is a very limited commodity, once lost in can not be regained. My massage therapy practice, a time-dependent business, is run by appointments. This assures you of your hour massage and that your appointment will be on time. Seldom, if ever, do we start late. If you are late, the appointment will still end at the appointed hour, which penalizes you and not the person scheduled

after you. That is only fair!

If you find it necessary to cancel or change an appointment, please allow at least 24 hours prior notice. Any changes or cancellations (or missed appointments) less than 24 hours in advance, will obligate you to pay for the originally scheduled hour. Should a substitute be found to fill your appointment, no charge will be made for the missed appointment. (I will not "double dip.") I will go out of my way to be fair—and you are expected to do the same.

Fortunately, this policy has not been abused since I have been in practice. In fact, most clients have voluntarily paid for their missed appointments. It is an embarrassing situation to have to enforce this policy, but that is business. Should you feel that this policy is unreasonable, please discuss it with me.

I value our relationship and hope that we can continue it on a professional and sound basis. Hopefully, you benefit from your massage as much as I enjoy having you as one of my clients.

So far, this policy has worked very well—even with the person who was its "inspiration!" Should you feel such a written policy would be beneficial to your practice, please feel free to use the above wording or draft your own. It works, it's fair, and the clients are understanding.

CHARLES E. TUTTLE

reprinted from the AMTA-OH newsletter,
Hands Across Ohio.

BUSINESS PLANNING

***The Business Plan
Resources***

BUSINESS PLAN ELEMENTS

Owner's Statement

Vision & Goals

Definition of the Business

Describe your Philosophy

Marketing Plan:

Define your **3 Target Market Profiles**

Specifics

Descriptive statement

Define your **Marketing Methods**

Define your **Client Retention** strategies

Financial Plan:

Fees & Income Projections

Business Expenses

Forecasts- Income & Expenses

Client Policies

Insurance and Legalities

Business and personal requirements

Business form and licensing requirements

BUSINESS PLAN
for

Completed on

Owner's Name _____

Business Name _____

Business Address _____

Business Phone _____

Business Definition

Describe the major services offered -

Unique Features -

Describe the unique features which distinguishes your practice from others, such as your experience, variety of services/techniques, pricing, locations, hours, credit terms, products used or sold.

List the other services/special products offered -

Describe your location -

Vision and Goals

Career Vision: My career and life vision for the next three years, from _____ through _____ is: *(write a descriptive paragraph)*

My Major Goals For The Next Year (Year 1) Are -

State at least **eight** (5 of which are career oriented) goals which support the achievement of your vision.

Vision and Goals *(continued)*

My Major Goals For The Next Two Years (Year 2) Are -

State at least **eight** *(5 of which are career oriented)* goals which support the achievement of your vision.

My Major Goals For The Next Three Years (Year 3) Are -

State at least **eight** *(5 of which are career oriented)* goals which support the achievement of your vision.

PHILOSOPHY

Write a descriptive statement about your philosophy (your values and beliefs) about the nature of well-being and your particular approach to health; including the role of Massage & Bodywork in that scheme.

PRIMARY TARGET MARKET DESCRIPTION #1

Write a narrative paragraph describing one typical (or ideal) client from this target market, including demographic and psychographic descriptions. [reference pages 345 - 347 in Business Mastery for sample] Be as specific as possible list names of neighborhoods, stores, places of worship, local organizations, companies, etc.

PRIMARY TARGET MARKET DESCRIPTION #2

Write a narrative paragraph describing one typical (or ideal) client from this target market, including demographic and psychographic descriptions. [reference pages 345 – 347 in Business Mastery for sample] Be as specific as possible list names of neighborhoods, stores, places of worship, local organizations, companies, etc.

PRIMARY TARGET MARKET DESCRIPTION #3

Write a narrative paragraph describing one typical (or ideal) client from this target market, including demographic and psychographic descriptions. [reference pages 345 – 347 in Business Mastery for sample] Be as specific as possible list names of neighborhoods, stores, places of worship, local organizations, companies, etc.

Business Plan

Marketing Plan

Based on your target market profile, identify three primary (and different) marketing methods and plan how you will use them to develop your business. Plans must be specific. You may want to have three specific methods for each of your target Markets

Marketing Method #1: _____

Marketing Goal -

Who specifically does this goal target?

What steps are necessary to implement it?

What is the timeline?

What is the budget?

Marketing Method #2: _____

Marketing Goal -

Who specifically does this goal target?

What steps are necessary to implement it?

What is the timeline?

What is the budget?

Marketing Method #3: _____

Marketing Goal -

Who specifically does this goal target?

What steps are necessary to implement it?

What is the timeline?

What is the budget?

CLIENT RETENTION

Define at least three strategies to maximize client retention for each area listed.

PRE-SESSION

INITIAL SESSION INTERVIEW

SESSION

POST-INTERVIEW

FOLLOW-UP INITIAL

ON-GOING

DOCUMENTATION

EDUCATION for CLIENTS

CLIENT POLICIES

Define your hours of availability, your session structure and policies for client interaction.

APPOINTMENT SCHEDULING

Day	Hours
Monday	
Tuesday	
Wednesday	
Thursday	
Friday	
Saturday	
Sunday	

APPOINTMENT DURATION

Regular Session
Partial Session
Special Session

Time between appointments

CANCELLATIONS & NO SHOW POLICY-

GIFT CERTIFICATES- (Used by, unused, transferability, etc.)

REFUNDS-

Business Plan

FEES

Define the specifics for each of the session types that apply to your practice. If you will not offer a service listed, please delete, add any additional types of sessions as necessary or write N/A next to it. Be sure that the sessions described match the sessions listed on your Client Policies page.

1. FEES FOR THE FOLLOWING SERVICES ARE:

Full Session	\$
Partial Session	\$
Introductory Session	\$
Session Packages	\$
Special Situations:	
Professional	\$
Courtesy	
Referral Discount	\$
Promotional	\$
Discounts	
Sliding Scale Fees	\$

2. PLANS FOR INCREASING FEES:

Date:	Fee	\$
Date:	Fee	\$

Policy on increasing fees for current clients:

For new clients:

For previous clients:

Business Plan

3. PROJECTED AVERAGE WEEKLY CLIENTS:

FIRST YEAR

1st six months from	_____	to	_____	
	Fee (\$)	# Average Weekly Clients		Projected Monthly Income
Full Session	_____ x _____		x 4.2 =	_____
Discounted Sessions	_____	_____		_____
Partial	_____	_____		_____
Introductory	_____	_____		_____
Other	_____	_____		_____
			TOTAL \$	<u>_____</u>

2nd six months from	_____	to	_____	
	Fee (\$)	# Average Weekly Clients		Projected Monthly Income
Full Session	_____ x _____		x 4.2 =	_____
Discounted Sessions	_____	_____		_____
Partial	_____	_____		_____
Introductory	_____	_____		_____
Other	_____	_____		_____
			TOTAL \$	<u>_____</u>

SECOND YEAR

1st six months from	_____	to	_____	
	Fee (\$)	# Average Weekly Clients		Projected Monthly Income
Full Session	_____ x _____		x 4.2 =	_____
Discounted Sessions	_____	_____		_____
Partial	_____	_____		_____
Introductory	_____	_____		_____
Other	_____	_____		_____
			TOTAL \$	<u>_____</u>

2nd six months from	_____	to	_____	
	Fee (\$)	# Average Weekly Clients		Projected Monthly Income
Full Session	_____ x _____		x 4.2 =	_____
Discounted Sessions	_____	_____		_____
Partial	_____	_____		_____
Introductory	_____	_____		_____
Other	_____	_____		_____
			TOTAL \$	<u>_____</u>

Business Plan

BUSINESS EXPENSES

Provide estimates for anticipated business expenses for each period from the previous income projections.

Year 1: 1st six months from _____ to _____

	Monthly	Periodic (per annum)	Periodic (amortized per month)
Rent			
Utilities			
Communication			
	Business landline / fax		
	Mobile phone		
	High-speed Internet		
	Web site / host		
	Email host / bulk mailer		
Bank fees			
	Credit card processing		
	Other fees		
Supplies			
	Office		
	Massage		
Insurance			
Professional Society			
Dues			
Education (CEUs)			
Business automobile			
Marketing			
	Postage		
	Design fees		
	Stationery		
	Business cards		
	Promotion		
Repair, cleaning, maintenance, laundry			
Travel			
Business loan payments			
Licenses and permits			
Professional fees			
Equipment			
Furniture & fixtures			
Decorations			
Inventory			
Salary / draw			
Staff / payroll			
Other			
TOTAL EXPENSES	\$ _____	\$ _____	\$ _____

Business Plan

BUSINESS EXPENSES *(continued)*

Year 1: 2nd six months from _____ to _____

	Monthly	Periodic (per annum)	Periodic (amortized per month)
Rent			
Utilities			
Communication			
	Business landline / fax		
	Mobile phone		
	High-speed Internet		
	Web site/host		
	Email host/bulk mailer		
Bank fees			
	Credit card processing		
	Other fees		
Supplies			
	Office		
	Message		
Insurance			
Professional Society Dues			
Education (CEUs)			
Business automobile			
Marketing			
	Postage		
	Design fees		
	Stationery		
	Business cards		
	Promotion		
Repair, cleaning, maintenance, laundry			
Travel			
Business loan payments			
Licenses and permits			
Professional fees			
Equipment			
Furniture & fixtures			
Decorations			
Inventory			
Salary/draw			
Staff/payroll			
Other			
TOTAL EXPENSES	\$ _____	\$ _____	\$ _____

Business Plan

BUSINESS EXPENSES *(continued)*

Year 2: 1st six months from _____ to _____

	Monthly	Periodic (per annum)	Periodic (amortized per month)
Rent			
Utilities			
Communication			
	Business landline / fax		
	Mobile phone		
	High-speed Internet		
	Web site/host		
	Email host/bulk mailer		
Bank fees			
	Credit card processing		
	Other fees		
Supplies			
	Office		
	Message		
Insurance			
Professional Society Dues			
Education (CEUs)			
Business automobile			
Marketing			
	Postage		
	Design fees		
	Stationery		
	Business cards		
	Promotion		
Repair, cleaning, maintenance, laundry			
Travel			
Business loan payments			
Licenses and permits			
Professional fees			
Equipment			
Furniture & fixtures			
Decorations			
Inventory			
Salary/draw			
Staff/payroll			
Other			
TOTAL EXPENSES	\$ _____	\$ _____	\$ _____

Business Plan

BUSINESS EXPENSES *(continued)*

Year 2: 2nd six months from _____ to _____

	Monthly	Periodic (per annum)	Periodic (amortized per month)
Rent			
Utilities			
Communication			
	Business landline / fax		
	Mobile phone		
	High-speed Internet		
	Web site/host		
	Email host/bulk mailer		
Bank fees			
	Credit card processing		
	Other fees		
Supplies			
	Office		
	Message		
Insurance			
Professional Society Dues			
Education (CEUs)			
Business automobile			
Marketing			
	Postage		
	Design fees		
	Stationery		
	Business cards		
	Promotion		
Repair, cleaning, maintenance, laundry			
Travel			
Business loan payments			
Licenses and permits			
Professional fees			
Equipment			
Furniture & fixtures			
Decorations			
Inventory			
Salary/draw			
Staff/payroll			
Other			
TOTAL EXPENSES	\$ _____	\$ _____	\$ _____

Business Plan**FORECAST**

Forecast for specific months when a change occurs; such as an increase in rates, volume of clients seen, loss or addition of employment income, addition of products for sale, increase or decrease in Business Expenses or Personal Expenses.

INCOME**MONTH**

Clients (# x \$) (from previous page)	\$	\$	\$	\$
Products	\$	\$	\$	\$
Employment	\$	\$	\$	\$
Other	\$	\$	\$	\$
1. TOTAL INCOME	\$	\$	\$	\$

EXPENSES**Business:**

Monthly	\$	\$	\$	\$
Periodic	\$	\$	\$	\$
2. Total Business	\$	\$	\$	\$

Personal:

Monthly	\$	\$	\$	\$
Periodic	\$	\$	\$	\$
3. Total Personal	\$	\$	\$	\$

4. Taxes

(Business income – Business expenses) x 25%	\$	\$	\$	\$
--	----	----	----	----

5. TOTAL EXPENSES

(Line 2 + 3 + 4)

NET PROFIT/LOSS

(Line 1 – Line 5)	\$	\$	\$	\$
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BUSINESS ORGANIZATION

INSURANCE - *Indicate which insurance you plan to obtain, with desired amount of coverage and effective date.*

Professional Liability

Business Liability

Property / Renter's

Fire and Theft

Auto

Medical

Disability

LEGAL ISSUES

Form of business:

Fictitious name:

Practice license:

Research Article ASSIGNMENT

Read an article reporting on a research study. Write a one-page report and answer the following questions in the report. The report must be typed. Attach a copy of the research article to your write-up.

1. What specifically is the question or hypothesis being examined by this research?
2. How was the research conducted? Give a brief description.
3. How large a research sample was used?
4. What were the results of the study?
5. What were the conclusions of the study?
6. Do you think the conclusions logically follow from the study?
7. Who sponsored the research?
8. What are the limitations of this particular study?
9. What was of interest to you about this study?

Make sure your article is based on a specific research study. If it is, the information for question #1-5, and #7 will be readily available. Questions #6, 8, and 9 are based on your critical evaluation of the research information presented.

The intention of this assignment is for you to find some helpful scientific data to support your Benefits listed in your Marketing. It is best to find an article that directly relates to one of your Target Markets or to the Type of Bodywork you specialize in providing to clients.

MASSAGE & BODYWORK RESEARCH RESOURCES

To download a digital copy of this document with useable hyperlinks go to:

http://homepage.mac.com/jackrb/Download_Site/FileSharing11.html

What you can find online:

1. Citations that let you know certain research exists, and in which journal it was published (then you may find the journal online or you have to go look for it in a library).
2. Articles that *report on* research done, but do not give you the original research. The journal where the research was originally published is usually given, so you can find the full-text either online or in a library. *Massage Magazine* publishes many articles like this.
3. Full-text articles — jackpot! Many full-text research articles are available on line.

PRIMARY ONLINE RESOURCE SITES

AMTA Foundation Research Database

http://www.massagetherapyfoundation.org/rd_geninfo.html

The Foundation site is becoming a central clearinghouse for all things related to massage research. This page is an informative overview of the research database. Use the **Research Database** link on the left to access the search engine. Registration is required to use the database, but searching the DB is free. It turns up citations on a wide range of studies. Under the **Library** link the “Articles of Interest” link contains the full-text of some actual studies.

TRI – Touch Research Institute

<http://www.miami.edu/touch-research/>

There are over 100 citations for studies done at TRI. Abstracts are also available for studies in the areas of acupuncture, massage, T'ai Chi, and yoga.

Massage Magazine Research

<http://www.massagemag.com/Magazine/research.php>

About 70 articles *reporting on* research for a variety of conditions. Citations included.

PubMed

<http://www.ncbi.nlm.nih.gov/entrez/query.fcgi>

PubMed can be of great help in finding both citations and full text articles in online journals. PubMed, public access to Medline — the world's most comprehensive source of life sciences and biomedical bibliographic information, includes over 15 million citations for biomedical articles back to the 1950's.

Alt HealthWatch

<http://sdplweb.sannet.gov/>

If you have a San Diego Public Library card, you can access *Alt HealthWatch* and many other helpful databases. *Alt HealthWatch* offers an immediate resource of full-text articles from 180 international and often peer-reviewed journals focusing on the many perspectives of complementary, holistic and integrated approaches to health care and wellness.

Massage Today

<http://www.massagetoday.com/selectarticles/research.html>

An interesting selection of research articles.

Alternative Therapies in Health and Medicine

<http://www.alternative-therapies.com/at/login/index.jsp>

Alternative Therapies in Health and Medicine is a peer-reviewed healthcare journal indexed in the National Library of Medicine since 1996. ATHM is a forum for sharing information concerning the practical use of alternative therapies in preventing and treating disease, healing illness, and promoting health. A subscription to the journal opens up the online back-issues full of complete research studies.

Colorado Massage Network

<http://www.coloradomassage.net/rcitations.shtml>

Citations of research into 11 categories of massage therapy efficacy.

European Fascia Research Report

<http://www.somatics.de/FasciaResearch/ProjectInterimReport04.pdf>

This report dated December 2004 cites preliminary findings on research into the properties of fascia. Using tissue samples of human lumbodorsal fascia they explore questions of why it responds to manual pressure, why it is pliable and adaptable.

Internet Health Library

<http://www.internethealthlibrary.com/Therapies/MassageTherapy-Research.htm>

This site contains 19 reports on research examining effects of massage on various conditions. The reports range from brief summaries to one study of Massage & Heart or Lung Transplantation that contains sufficient detail to be reproduced.

Massage and Bodywork Magazine

<http://massagetherapy.com/articles/results.php?keyword=research>

Here are articles published in the ABMP Massage and Bodywork magazine. A search turned up 20 articles on research. Search by keyword.

MyoLink, LLC

<http://www.trigger-point-injections.com/publications.htm>

Four research study articles on trigger points.

WholisticHealingResearch.com

<http://www.wholistichealingresearch.com/Research/RschTop.asp>

This is a very rich site on research and for research on Spiritual Healing and Complementary Alternative Medicine (CAM), QiGong, Reiki, Therapeutic Touch, Healing Touch, Plants, Animals, Native American and much more.

World Institute for Self Healing Inc.

<http://www.wishus.org/research.asp>

Many studies of Qigong healing.

MASSAGE RESEARCH COMPILATIONS

Field, T. (2000). *Touch therapy*. New York: Churchill Livingstone.

Rich, G. J. (ed.) (2002). *Massage therapy: The evidence for practice*. St. Louis: Mosby, Inc.

FINANCES

Recordkeeping
Insurance
Taxes

Helping Physicians to Recognize the Importance of Massage Therapy

*Patricia J. Raskin and
Antonio M. Carbonell, MD*

In the past year major popular publications such as *Time*, *US News & World Report*, *American Health*, and *Muscle and Fitness* have featured the emergence of so called "alternative medicine" into the mainstream of American consciousness. This grab bag of assorted techniques and belief systems is seen to be in competition with the medical establishment epitomized by the doctors who constitute the American Medical Association. Rather than positing a simplistic antagonism toward conventional medicine, massage therapists who live up to the high standards of their long historical tradition have a golden opportunity to create a solid bridge to physicians, blending the best in allopathic and holistic approaches. This article offers massage therapists advice about how to cooperate with physicians in helping patients make the journey from illness to continued and sustainable wellness.

Your role as massage therapist is to initiate contact and speak the physician's language

This means you have to be aware of the physician's philosophy, approach, and scientific terminology, which is mainly derived from Greek and Latin roots. Dealing with the physician may mean reframing your attitude, keeping an open mind and avoiding personality clashes, especially when the physician exhibits a strong ego, bolstered by years of entrenched, unquestioned authority in the field. Be sure that you understand the physician's point of view on patient care and wellness. If you can demonstrate that a holistic approach achieves positive results in patients whose prior medical

treatment was ineffective, then you have an opportunity for a meaningful dialog with the physician, who may become more receptive to your methods. Physicians who have spent their careers treating illness may be only superficially aware of alternative approaches to promoting wellness. (It is well known that many doctors in recent decades quit smoking, after witnessing its morbid results firsthand.) You can help the physician reduce his or her own level of stress due to the incessant demands of patients, by advocating stress management for both the physician and the patients. By demonstrating your ability and willingness to help them regain and maintain health, you will be seen by the physician as a welcome ally, rather than as a questionable fringe element.

Establishing your professional credibility is a must

Physicians spend a good part of their professional life certifying and recertifying themselves. They understand the rigors of examinations and peer review. Likewise you must show that you believe in the same high standards in your holistic field of expertise through established certification by nationally approved bodies in your specialties. In your first meeting with the physician, bring a resume of your training, expertise and certification. The goal is to show that you have a clear and documented health centered model that will facilitate the patient's recovery from illness, enhance well-being and reduce excessive demands on the physician's time and energy. Thus it becomes evident that your service is the next logical step in

complementing physician care and deserving of a fair trial run to see what results can be achieved in practice. The key word here is cooperation, not competition. And in the world of the physician, where competition is the rule, your approach can be a breath of fresh air.

Facilitate your interaction with the physician

Since physicians are so busy most of the time, you can make it easier for them to work with you if you create simple brochures and literature that explain your methodology. Next, offer a free demonstration to the physician and the physician's staff so that they can experience your work. Take notes of this sample session that are detailed but clear and easy to understand. Show these notes to the physician as an example of your record keeping. Develop a written form that physicians and nurses can use to order your services as presented in the sample referral form on the next page. (You may also print a map of directions to your location on the back side of the form.)

Present a plan to the physician which includes your goals and approaches to different situations. If you would like to work in the physician's office, state the number of people you can comfortably see in a day and list the days and times that you are available to work. If you are interested in referrals and have your own office, list your office hours.

Maintain contact and follow through

Physicians like to keep track of their patients' ongoing process. Sending the

physician periodic, carefully drafted, typed progress reports emphasizing measurable degree of improvement will do wonders to solidify your professional relationship with the physician. Phone calls about dramatic results are often welcome. Don't underestimate the power and influence of the head nurse, who often serves as the eyes and ears of the physician and can put your message through when the physician is busy or unavailable. Referrals should be a two way street. As your practice grows, you will have more occasion to make referrals to the physician, as well as receive them. Whenever an opportunity for a physician referral arises, be sure to make a personal call for the patient and talk to the physician directly about the problem you've discovered.

Create a patient-focused relationship with the physician

The patient/client's well-being is the ultimate goal of both the massage therapist and physician. By keeping the patient's welfare in the forefront when you are dealing with the physician, you will be preserving and nurturing the professional relationship. Always ask yourself the question, how will this treatment program benefit the patient? This is especially important to remember whenever misunderstandings occur or a communication problem develops. By listening to the physician and by showing concern for the patient, you will be able to work on the same side of the problem. However, if there is a strong disagreement in your approaches, be open to discuss the matter with a desire to learn the physician's point of view. This does not mean that you have to relinquish your approach, but it may be best to modify it for this patient, providing you understand the physician's rationale. Misunderstandings can be reduced if you keep the lines of communication open and always tell the physician of any new approaches you will use. This can and will prevent future problems.

In today's world of spiraling health care costs in the management of illness, it is imperative that massage therapists

emphasize the cost saving benefits of enhancing wellness. In order to create a win-win relationship with the allopathic medical community, the holistic community needs to develop and maintain a cooperative model that complements the efforts of the physician in the overall spectrum of medical care. Holistic medicine is best presented to the medical community as a complementary approach to their treatment of illness rather than as an alternative. To achieve this goal, massage therapists must be willing to model what they preach—cooperation, flexibility, vitality, and well-being. ■

Patricia Raskin, author of Creative Marketing: A Workbook on Personal Marketing for the Massage Therapist, teaches at several massage therapy schools on the East coast and was a presenter at the last two AMTA National Conferences.

Antonio M. Carbonell, MD, is a practicing emergency room physician in North Carolina, with a background in plastic surgery and teaching clinical anatomy. He gave a presentation on dermatology with his wife Patricia Raskin at the 1992 AMTA National Conference. Their address is L 1265, Clemmons, NC 27012; phone (800) 528-5890.

Massage Therapy Associates, Inc.
Stress Reduction Lane
Bliss Town, Relaxed State 99909

919-999-5555
 Fax: 919-222-3333

Patient Name _____
 Diagnosis/Impression _____
 ICD-9 Diagnosis Code _____

I am referring my patient *JANE BACK PAW* to you for the following TREATMENT(S):

- Deep Muscle Massage
- Shiatsu Massage
- Reflexology Therapy
- Polarity Therapy
- Lymphatic Drainage
- Swedish Massage
- Hydrotherapy
- Cranio-Sacral Therapy
- Pregnancy Massage
- Myofascial Release
- Body Image Reeducation
- Neuromuscular Reeducation
- Acupressure Treatment
- Joint Mobilization
- Trigger Point Therapy
- Russian Massage
- Other _____

Treatment Objectives and Goals: _____

Patient is currently on the following medication(s): _____

Physician's Signature _____ Date _____
 Physician's address and phone number _____

**IN MAKING THIS REFERRAL, PHYSICIAN CERTIFIES THAT
 PRESCRIBED REHABILITATION IS A MEDICAL NECESSITY**

Making Insurance Work for You

Practice Management Tools for Insurance Billing

Part 6 of a Series

by Christine Rosche

The previous column showed how to get reimbursed by an insurance company, explaining the forms, terminology, prevailing fees, billing procedures and practices. Now I'll show you how to administer the insurance billing in your practice and write effective progress reports, explain why claims are rejected and what you can do about it.

Proper Paperwork is the Key

The key to successful insurance billing is doing all your paperwork right. You need a basic bookkeeping and ledger system that will work for you. If you are affiliated with a doctor's office, the staff can help you set up the appropriate system. If you work in your own office, ask medical office staff members for referrals to reputable distributors of bookkeeping or accounting systems, as well as people who can give you good training.

If you are just getting started, review several systems before choosing the best one for you. At first, you may want to use a simple system that you can manage easily on your own. Eventually, you will need to find someone to serve as bookkeeper to run the system for you. Be sure to ask others for references for reputable bookkeepers. Also, learn and understand your system well so that you can train others in it if you have to.

Review the System, Stay Involved.

No matter what your level of involvement, you must understand the basics of record keeping and bookkeeping in your insurance practice. Evaluate the administration of the insurance practice quarterly.

Review accounts receivable and determine the percentage of collections from insurance companies. This will help you stay abreast of how much money you can have outstanding in your practice at any given time and how many

clients need to pay you at the time of the visit.

Also, keep an insurance log on each client which tells you the date billed, the account billed, the amount paid, and the balance due. Be sure you or the bookkeeper accurately records when payment is received by an insurance company and how much is still owed. Keep careful records of which companies pay on time and which are consistently late or delay payment.

Why Claims are Denied or Delayed

The Time Value of Money. Insurance companies invest premium dollars in a number of diverse ways. As a profit-making business, their strategy is to collect the maximum, keep it as long as possible, and pay out the minimum. If they pay a claim in four months instead of one, they have an extra three months to put the money to work. When millions of dollars are involved, even a few days make a big difference.

No Medical Necessity Equals No Payment. Insurance companies are also concerned with "medical necessity" and limiting the conditions and procedures they will cover. To analyze the huge amount of information involved, they maintain computer databases of all health care providers by specialty to see who is providing what procedures and services, at what price, and where. The process of collecting and analyzing this provider information is called "utilization review" or UR. (You may have seen the initials URC, which stands for Utilization Review Committee.) UR is used to establish guidelines for who gets paid and how much.

Insurers will also look carefully at how long a service is being performed and if the patient has a pre-existing condition; that is, if he had the problem or disease before buying

the insurance. Many insurance contracts limit the number of visits or have special exclusions (called *waivers*) for pre-existing conditions.

Insurance companies often ask for more information on a claim. They want to know the diagnosis, the date treatment began and how long you expect treatment to last. Such inquiries should be answered by the supervising provider or referring physician because the reply serves to document the necessity of the claim.

Insurance Pays for Disease, not Health Maintenance. An acupuncturist responded to an insurance company inquiry by giving the diagnosis and treatment plan and saying the patient was doing quite well and learning how to manage stress better. (His letter reflected Eastern health care philosophy, where the doctor gets paid when the patient is well and learning how to maintain his own health. Western, or allopathic, medicine is based on diagnosing and treating disease.) After that letter, the insurance company stopped payment, saying the services were no longer medically necessary.

Our system of medical insurance is really a pre-paid health care system (ensuring that the patient gets reimbursed when sick), not a health insurance system (paying to assure wellness). Make sure you tell the clients that the insurance company pays only for treatment visits. Any services to maintain or enhance their health they must plan to pay for themselves.

When to Expect Payment; Keep Track

You can expect payment in four to six weeks for most major medical insurance companies, four to six weeks for workers' compensation carriers, and two to four weeks for automobile insurance carriers (or Med-Pay, where the client's insurance company pays all medical costs.)

If the case will be settled in court and there is no Med-Pay coverage on the client's car insurance, payment may be delayed six months to several years. In some states you may charge workers' compensation carrier interest after 30 days if the claim is not paid. Check with your state-workers' compensation board for further information.

Have an accurate follow-up system in place for companies that consistently pay late or delay payment. You or

your office assistant must follow-up both in writing and by telephone on claims that have not been paid or that are consistently delayed. Send an insurance tracer (a special form for the purpose) and make a follow-up phone call to determine the reason for the delay of payment.

In addition to the letter documenting medical necessity, many carriers will require accurate, regular progress reports. Whether you work in a doctor's office or your own office, if insurance reimbursement is involved, you must keep accurate progress reports.

Also, you must keep a copy of every report in your client file and in the doctor's patient file. Comply with the following guidelines for charting, and remember to use the terms "soft-tissue therapy" or "neuromuscular re-education"—language the insurance company understands. Write brief, succinct notes describing exactly what muscle groups you worked on and for how long.

The SOAP System for Medical Charting

S-Subjective: Describe the presenting problem, including any verbal complaints and symptoms discussed by the client or the doctor. You may write these as, "Doctor states that client has low back pain, sciatica, and restricted range of motion in her neck." Or "Client states that she has pain in her lower back and shoulders." Always use the specific words of the client and the doctor.

O-Objective: Specify exactly what you are doing and to which muscles. For example, "Soft-tissue therapy and neuromuscular re-education to right infraspinous, deltoid, and rhomboids." Indicate how long you worked on each area.

For example: "15 minutes to lower back (specify muscles worked on) and 30 minutes to upper back and shoulders (indicate muscles worked on)." If you have any objective measurements, list them here. For example, goniometric measurement can be used to indicate flexion, extension, adduction, and abduction of the areas you are working on.

A-Assessment: In unlicensed states the doctor or supervising licensed provider writes assessments of the patient. In some licensed states, the practitioner is trained to do assessments within his/her scope of practice. For example:

"Patient has somato visceral referral into the left testicle from active trigger points in the left multifidus at the L-5, A1-2-3 region. He presents with decreased soft tissue ischemia to the lumbar musculature and has less pain while driving."

P-Plan: Decide what you think is the most important procedure for subsequent sessions. "Refer to a doctor for re-evaluation" or "Refer to psychotherapist for stress counseling." State how long you will continue to work with this client based on the doctor's evaluation.

For example, "Dr. Jones recommends that I continue to see this client two times per week for 30 minutes for four weeks and follow up with one time per week for two weeks."

Why Claims are Rejected

1. Non-standard diagnosis. The diagnosis must be clear and follow the terminology of the medical diagnostic coding books.
2. Missing or incomplete diagnosis.
3. Inconsistent diagnosis and procedure codes. The diagnosis must correspond to the procedure code on the billing form. The services of body therapy professionals are billed under physical medicine procedure codes such as neuromuscular re-education and massage therapy. The procedure codes must be billed with the related diagnostic codes given by the doctor from the physical medicine diagnostic code books, such as back pain, muscle spasm, neck pain, fibromyalgia. These diagnostic groups refer to the physical body.
4. Multiple same-day visits. Normally, a bill may not show two or more visits on the same day without explanation. For example, a bill may be rejected because it shows a chiropractic adjustment, an office visit with the doctor, and an hour of massage therapy on the same date. Some insurance companies consider this excessive service in one day or excessive charges. (Note: For workers' compensation claims, most carriers will pay for massage therapy if it is done on a different day than the doctor's office visit.)
5. Incorrect dates. Be sure all dates are listed and accurate.
6. Blank fee column. Fill in the fee and total the charges for each claim.
7. Charges are not itemized.

Congratulations! By following the above guidelines on charting, record keeping, and administering your insurance-oriented practice, you are taking a major step toward business mastery. By incorporating the principles on how to get reimbursed by an insurance company and how to work with health care providers, you build a foundation for a successful career in the rapidly growing field of clinical body therapy. Only those who are ready and prepared to meet these challenges will succeed and lead their professions.

Christine Roushe, MPH, CTP, CBT, author, educator, and consultant, is America's leading authority in the field of insurance reimbursement for massage professionals and body therapists. She is the author of The Insurance Reimbursement Manual, publisher of The Professional Bodyworker Newsletter, and teaches at massage therapy school nationwide. She is a certified Trager practitioner and massage therapist in private practice in Palo Alto, CA. Roushe is the founder of BodyTherapy Business Institute. Readers may contact her at 415/856-3151 or 800/888-1516.

8. Dual fee schedule. You may not charge higher fees to insurance clients.
9. Fees higher than usual, reasonable or customary. The company may pay the claim but with the amount adjusted downward to the prevailing rates according to their URC tables for this service, by this provider, in this city. In general insurance companies do not pay more than \$90 to \$110 per day for services.
10. Incorrect patient account or identification number.
11. Missing patient information. Make sure the patient answers all questions on his part of the insurance form.
12. Missing attachment or labels.
13. Incorrect professional service codes.
14. No valid provider state license number. Most major medical insurance carriers reimburse only for the services of providers who are licensed by their state. Services of unlicensed providers must often be billed under the number of the licensed provider.

Many companies now track the number of claims a provider submits for specific procedures. If they think a provider is billing excessively for certain services, they will request further information and carefully review the claim to see if the services are medically necessary.

Remind your clients to read their insurance policy carefully to determine deductible, benefits and restrictions or limitations. While they are responsible for knowing the details of their contract with the insurance company, it is your income that is affected.

Forming a Professional Relationship

With a Licensed Healthcare Provider

By Christine Rosche

[This is the first of a series of articles which explain some intricate details of obtaining insurance reimbursement for massage therapy. While it presents helpful practical legal and financial information, this article is not intended as a substitute for professional legal, financial, or tax advice. Such advice must be obtained in consultation with the appropriate professional in your state.]

Doctors are old hands at receiving reimbursement from health-insurance companies, otherwise known as third-party payers. So a logical step toward having your clients' massage-therapy expenses paid by insurance is for you to have an alliance with a doctor who will bill insurance companies and pay your fees. You must first find a doctor who will agree to such an arrangement and then negotiate the details.

In order to establish and maintain an effective working relationship with a doctor, you and the doctor's office must draft an appropriate contract defining your agreement, including financial arrangements and criteria for terminating the agreement. Many body-therapy professionals have based a working relationship with a doctor on a verbal agreement, only to terminate the relationship later because of misunderstandings and assumptions that were never clarified. To be more fully professional, you need to have

a clear, written agreement at the start of the relationship.

Specifically, in order to avoid violating the tax and labor laws, you and the doctor both must understand and honor the distinction between an independent contractor and an employee. The exact determination and implications of contractor versus employee status can be somewhat complicated, so you may wish to consult a tax advisor, attorney, or Internal Revenue Service for a definitive answer.

The following guidelines can help you decide whether you should be an independent contractor or an employee.

Independent contractor

You work for a number of professionals and clients, set your own hours, fees, and method of working. You are required to make quarterly payments of your estimated Federal taxes, which include self-employment tax. Self-employed persons pay 1.5 times as much in Social Security taxes as employees because there is no employer contributing to the retirement fund.

Employee

You work on the doctor's premises only, according to terms he or she sets (fees, hours, and method of working). If you are an employee, the doctor is required by law to withhold from your wages payments for state and Federal income taxes, as well as Social Security and unemployment

deductions. The doctor also must forward these monies to the proper tax-collecting agencies, according to established schedules.

Unfortunately, not every situation is quite so clear cut. The rules are complex and vary from state to state, which is further reason why you should seek competent advice.

Abuses by licensed healthcare providers have come to light and the Internal Revenue Service has a special enforcement program to prosecute doctors who illegally treat their employees as independent contractors. Understanding the law and your rights and obligations should help you avoid problems.

On the following pages are samples of three types of contracts: employment contract (working in a doctor's office), independent contractor agreement, and professional contract. ■■■

Christine Rosche, MA, MPH, founder and director of the Body Therapy Business Institute, 4157 El Camino Way, #C, Palo Alto, CA 94306, is author of The Insurance Reimbursement Manual, 5th Edition, Copyright 1997 by the author. This article was adapted from Chapter 3 of that book with permission of the author. Copies of the manual may be ordered by calling 800.888.1516. Adaptations of other chapters of this book will appear in future issues of MASSAGE THERAPY JOURNAL.

Employment Contract Sample

Employment Contract

The following is an agreement between Healthcare Chiropractic, Inc., (referred to as "office") and Karen Davis, Ms. T., (referred to as "therapist.")

HOURS: Massage Therapy will be provided by the therapist on Tuesdays and Thursdays between the hours of 2:00 p.m. and 7:00 p.m., as appointments are scheduled.

EQUIPMENT: Healthcare Chiropractic shall provide massage table, oil, lotions, linens, music, and sound system.

COMPENSATION: The office shall provide to Therapist a guaranteed salary at the rate of \$27 per hour paid every two weeks on the first (1st) and fifteenth (15th) day of each month. Healthcare Chiropractic shall be responsible for all payroll deductions such as state and federal tax. "No shows" shall be deemed the responsibility of the office, and the therapist shall be compensated at the same hourly rate.

CLERICAL: The office shall have sole responsibility to schedule all appointments, prepare necessary billing and various paperwork requirements.

OFFICE RATES: Office staff, which includes all doctors, shall schedule their own massage therapy appointments through the normal channels and will pay the therapist at the rate of \$40 per hour, plus \$10 for each additional fifteen (15) minutes or fraction thereof. Payment shall be due and payable upon completion of each massage.

TERMINATION: Each party shall have the right to cancel or amend this contract. Cancellation shall require two (2) weeks notice. Amendments may be made by notifying the other party in writing and must be mutually agreeable.

The intention of all parties is to provide a clear understanding of the method of operations and payments in order that no misunderstandings occur. It is hereby mutually agreed on and witnessed by the parties below.

CHIROPRACTIC OFFICE

MASSAGE THERAPIST

DATE

Independent Contractor Agreement Sample

Independent Contractor Agreement

The following is an agreement between Sally Moore, massage therapist, and Dr. Susan Smith, medical doctor.

Sally Moore is working on the premises of Dr. Susan Smith 3 days per week. The hours, as determined by Moore, are 9 a.m. to 4 p.m.

Moore provides massage therapy services to the patients of Dr. Smith and her own personal clients, as needed.

Moore provides massage table, oil, sound, and music systems. Dr. Smith provides linen service, office space, insurance billing by the office staff, and scheduling of all appointments.

The financial arrangement is as follows: Dr. Smith receives 40% (\$24) of \$60 charged patients per clinical massage hour. When seeing her own clients at the office, Moore pays Dr. Smith \$15 per hour for use of the office space and the linen service. Moore shall be responsible for payment of Federal and state taxes, as applicable.

It is agreed that Moore be paid biweekly (every 14 days) by the office of Dr. Smith, regardless of insurance reimbursements received by the office.

Each party shall have the right to cancel or amend this contract. Cancellation or amendment shall require two (2) weeks notice. Amendments must be in writing and mutually agreeable.

CHIROPRACTIC OFFICE

MASSAGE THERAPIST

DATE

Professional Contract Sample

Professional Contract

This contract specifies the terms and conditions of the professional working relationship of John Smith and Dr. Wayne Jones.

Smith works as an adjunctive body therapy practitioner out of his own office at 420 Emerson Street, Any Town, the same building which houses Dr. Jones's medical practice.

Smith agrees to provide body therapy services, in his own office, to patients of Dr. Jones, as scheduled by appointment and on an emergency basis, as needed.

Dr. Jones will give his patients a brochure and card and they will call Smith to arrange their appointments. Dr. Jones will call Smith with each patient's medical history, diagnosis, and specific recommendations for body therapy.

Dr. Jones's office will bill the patient's insurance company or give the patient the doctor's billing form to submit to the insurance company, as appropriate.

Smith will pay Dr. Jones a fee of \$10 per patient visit, at the end of each month, for the insurance billing and necessary supervision. Smith will keep treatment progress notes on file in his office for each patient seen and will submit copies to Dr. Jones's office at the end of each month.

For tax purposes, Smith is considered an independent contractor, responsible for declaring his own income and paying his own taxes.

Each party shall have the right to cancel or amend this contract. Cancellation or amendment shall require two (2) week notice. Amendments must be in writing and mutually agreeable.

CHIROPRACTIC OFFICE

MESSAGE THERAPIST

DATE

Massage Therapy Facts For Physicians

Americans are turning to massage therapy for relief from injuries and certain chronic and acute conditions, to help them deal with the stresses of daily life, and to maintain good health. In an August 2002 national survey of adult consumers by Opinion Research Corporation (ORC), 20% of adults surveyed said that such health reasons as muscle soreness/stiffness/spasm, reduction of pain, greater joint flexibility or range of motion, or injury recovery and rehab would motivate them to get a massage. Thirty-five percent of adults surveyed reported they would seek therapeutic massage for relaxation or stress reduction*

Medical professionals are becoming more knowledgeable about the efficacy and benefits of massage and are commonly integrating the services of massage therapists into patient care. Health insurance companies, realizing the cost savings of massage, may cover sessions with a massage therapist when they are a prescribed aspect of treatment. According to a survey of physicians, nurses and physicians assistants in Washington State (November 2000 to February 2001) by Group Health Cooperative, 74 percent of these medical professionals perceived the results of patient use of massage as always or usually effective for the purpose it was prescribed. **

In the 2002 consumer survey by ORC, of the 14 percent of adults who spoke to their healthcare providers about massage therapy, 76 percent reported that the conversation was favorable about massage and 19 percent reported the conversation was neutral. Of that same group, 30 percent were recommended to massage therapy by their physician and 27 percent were recommended to massage by their chiropractor. *

* From August 2002 survey commissioned by AMTA

**Weeks, J. The Integrator for the Bus. Of Alt. Med., April 2001

What Conditions May be Helped by Therapeutic Massage?

An increasing number of research studies show massage reduces heart rate, lowers blood pressure, increases blood circulation and lymph flow, relaxes muscles, improves range of motion, and increases endorphins (enhancing medical treatment). Although therapeutic massage does not increase muscle strength, it can stimulate weak, inactive muscles and, thus, partially compensate for the lack of exercise and inactivity resulting from illness or injury. It also can hasten and lead to a more complete recovery from exercise or injury.

People with the following conditions have reported that therapeutic massage has lessened or relieved many of their symptoms.

- Arthritis ¹
- Asthma ²
- Carpal tunnel syndrome ³
- Chronic and acute pain ⁴
- Circulatory problems ⁵
- Gastrointestinal disorders (including spastic colon, colic and constipation)
- Headache ⁷

A medical director of an insurance carrier in Idaho was questioned by a group of massage therapists: "Why isn't manual therapy a covered benefit in any of your plans?" He replied, "If every massage therapist can show me 6 months of SOAP charts on every patient, we will consider it."

Introduction

SOAP (Subjective, Objective, Assessment, Plan) charting is a standard format for documenting treatment sessions in the health care field. It is routinely used by physicians, physical therapists, chiropractors, nurses, massage therapists, and other medical and allied health professionals.¹ The rapid and widespread adoption of the SOAP format is a tribute to its simple structure and inherent flexibility. Any health concern, method of evaluation, and treatment style can be recorded in the SOAP format. The SOAP structure meets the needs of a variety of health care professionals in many settings.

The SOAP chart documents the patient's health information and goals, the practitioner's findings and treatment, and the patient's self-care routine; and records the patient's response to the solutions and progress toward the goals. The information is organized into four categories:

- ◆ Subjective—data provided by the patient
- ◆ Objective—practitioner findings
- ◆ Assessment—functional outcomes and diagnoses
- ◆ Plan—treatment recommendations

This structure prompts comprehensive information-gathering and makes data storage and retrieval easy.

The goals and advantages of documentation are discussed in depth in Chapter 4. To summarize, the goals of a SOAP chart are to:^{1,2}

- ◆ Organize and record data
- ◆ Stimulate the practitioner's recall
- ◆ Communicate with other members of the health care team
- ◆ Demonstrate progress and provide functional outcomes
- ◆ Provide a legal record documenting the patient's health and treatment
- ◆ Provide case study research data
- ◆ Prove reasonable and necessary care to third party payors
- ◆ Prove significant injury in personal injury cases
- ◆ Monitor quality

The advantages to using the SOAP format include:

- ◆ Consistency across professions
- ◆ Common language and communication style
- ◆ Demonstration of professionalism
- ◆ Proof of progress and functional outcomes
- ◆ Brevity and comprehensiveness
- ◆ Fast retrieval of information

Many variations of the SOAP format exist. This chapter provides basic information for manual therapists. The functional outcomes reporting style of charting—writing notes that address the patient’s ability to function in everyday activities, and setting goals and designing treatments to improve function—is emphasized. Some clinics, hospitals, and schools may require a standard of documentation that varies slightly from that presented here; however, the skills acquired through this text can be easily adapted to suit any system of documentation.¹

Guidelines for Charting

First and foremost, charting should contribute to the therapeutic relationship, not detract from it. Don’t let charting be a distraction. Follow the patient’s lead in the interview.² You do not need to follow the SOAP format in order. The beauty of the SOAP structure is that you can organize your information in a linear fashion without having to think or speak in a linear manner. As information is presented, place it in the appropriate section.

Be attentive and maintain good listening skills, as discussed in Chapter 1. If the patient is emotional and needs your undivided attention, record the information later. It is more important to be attentive to the patient in a moment of need than to write on the chart. Reflect your understanding of the patient’s experience after she is composed, and record the data appropriate to her health concern once she verifies the information.

Chart only information applicable to the patient’s condition and goals for health. Often a story surrounds pertinent details. Pay attention to the details of the story, but be selective when choosing the information to document. Record only data that substantiate the concern or contribute to the solution. For example, Lin experiences an increase in allergies at work when Sally, a co-worker from marketing, wears heavy perfume. It is not important to mention information about work or the co-worker. What is important to note is that Lin’s *allergy symptoms increase when exposed to perfume*.

Be brief. Jot down just enough to jog your memory later: words, dates, or short phrases.³ It is difficult to discern what information is important to the patient’s health as you hear her story. Things often make more sense later, after you have heard the whole story. Take brief notes and fill in the blanks after you summarize the pertinent information to the patient and get confirmation of your interpretation. Make sure you accurately represent the patient’s concerns.

As you ask the patient specific questions, for example, to confirm an assessment or rule out a particular pathology, record the positive and negative findings. For example: *No joint deformities. Active range of motion (including hands, wrists, elbows, shoulders, spine, knees, hips, ankles) is normal.*³

Consider another example in which “No” answers are as important as “Yes” answers: Jose has shoulder pain. The pain increases when he raises his arm to the side, but there is no pain with any other shoulder movement. Knowing that there is no pain with a particular action, if you are identifying a rotator cuff injury or determining bursitis versus tendonitis, could affect your treatment plan as much as knowing that there is pain with an action. Record all answers that contribute to the case.

Be objective. State everything in a factual manner. Draw conclusions based on factual data and record them in the Assessment section of the SOAP note, if your scope of practice permits it. Leave your opinions off the chart. For example, omit, *I think the patient doesn’t want to get better and is avoiding going back to work*. Instead, quote the patient directly in the subjective section. He may comment on their situation in ways that ade-

quately represent his state of mind, opinions, or emotions. Chart specific, measurable information and let the lack of progress, for example, demonstrate that the treatment is not producing results. The information should pertain to the patient, not to you.¹ Revisit the discussion in Chapter 1: if the relationship isn't productive, step up the communication and reconsider your approach.

Use consistent terminology and become fluent with standard abbreviations. (See Appendix: Abbreviations) There are common, standardized medical abbreviations used by all types of health care providers (HCP) applicable to manual therapy. For examples of data translated into abbreviations, see Bone Game 6-1: Translation.



BONE GAME 6-1

Translation



Headache pain, pounding, left frontal, moderate minus, 2 to 3 days, monthly, with menses for 10 plus years.

Abbreviation: HA (P), pounding, (L) frontal, M-, 2-3 day/mth, \bar{c} menses 10+ yr
the trigger point was moderately painful with digital pressure at the trigger point site and mildly painful at the referral site.

Abbreviation: TP M (P) \bar{c} dig. pres. @ TP site & L (P) @ ref. site
cervical flexion passive range of motion was limited moderate minus with mild pain at end range.

Abbreviation: C-flex P-ROM M- \bar{c} L (P) @ end range
right shoulder active abduction moderate segmented movement with mild compensational shoulder elevation at end range.

Abbreviation: (R)sh-abd A-ROM seg \bar{c} L comp. sh-elev @ end range.
moderate trigger point site pain changed to mild pain, mild referred pain changed to no pain.

Abbreviation: TP site M (P) Δ L (P), L ref. (P) Δ (P)
moderate segmented movement in right shoulder active abduction changed to smooth movement without compensational shoulder elevation.

Abbreviation: M seg. mvm't (R)sh-abd A-ROM WNL \bar{s} comp. sh-elev
patient supine, anterior-lateral view, deep inhalation, mild plus mobility restriction upper right.

Abbreviation: pt supine, ant-lat view, deep inhal., mob L+ restr. upper (R)
left biceps insertion moderate pain with mild digital pressure, mild plus referred pain into left elbow.

Abbreviation: (L) biceps insert. M (P) \bar{c} L dig. pres., L+ ref. (P) \rightarrow (L) elbow
1-hour full-body Swedish massage; 30-minute foot reflexology; or 90-minute Hellerwork—inspiration.

Abbreviation: 1 hr FB Sw (M); 30 min foot reflex.; 90 min HW—inspir.
muscle energy with cervical flexion, direct pressure on scalene trigger point, or myofascial release on diaphragm.

Abbreviation: MET \bar{c} C-flex, DP scal. TP, MFR diaph.
craniosacral therapy with attention to the thoracic cage, muscle energy for cervical flexion and extension, and lymph drainage for upper quadrants.

Abbreviation: CST T cage, MET C-flex & ext, LDT UQ (BI)

Add personalized abbreviations to the list of standard ones to meet the needs of your practice. Do not use abbreviations that are not on your list, even abbreviated words that you think are common, e.g., quads for quadriceps muscles, hams for hamstring muscles. Others who read the patient file must be able to interpret everything on the chart. Payment of your bill may depend on a claims representative understanding your notes. If you use a series of tests or modalities that do not have standard abbreviations, create your own shorthand and produce a legend to attach to the standardized list. For example, many of Sari's patients have been in car accidents. She finds it helpful to abbreviate information regarding the accident and whiplash-related injuries, but the abbreviations list she uses does not have the medical terms she requires for her practice. Therefore she includes her own shorthand legend with the standard list she sends out when her charts are requested. (See Figure 6-1)

Measure everything. Gather as much detail as possible to document the injury or health concern, and write it down. It is difficult to prove progress if there is nothing to mark progress against. For example, pain may still be present but diminished, occurring less frequently, with a shorter duration and fewer exacerbations than at the previous session. Be thorough.

Avoid vague statements. It is not enough to write: *feeling better*, *increased pain*, or *limited function*. Be specific. Rate the intensity of pain; describe the activities that are limited. Use measurable data to explain the symptoms, and compare the symptoms to those from the previous session to demonstrate progress. For example: *Moderate pain, constant, increasing to moderate plus pain with sitting for 1 hour or more* expresses an increase in pain when compared with: *mild pain, intermittent, increasing with heavy lifting*. "Feeling better"

Motor Vehicle Accident Treatment and Billing Abbreviations

accel	acceleration
CADS	cervical acceleration deceleration syndrome
CPT	Current Procedural Terminology
G-Force	acceleration force
HCFA-1500	Health Care Financing Administration current billing form
HCP	health care provider
ICD	International Classification for Disease
IME	independent medical examination
MVA	motor vehicle accident
PCP	primary care provider
PIP	personal injury protection
PR	peer review
pre-IS	pre-injury status
pre-XC	pre-existing conditions
+SB	wearing seat belt
SB-	not wearing seat belt
WAS	whiplash associated disorder



Client Information

Name: _____ Telephone: () _____ Date of Birth: _____

Address: _____

Referred by: _____ Telephone: () _____

In case of emergency: _____ Telephone: () _____

General & Medical Information

Occupation: _____ Age: _____ male female Physician: _____

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

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

- Yes No Do you frequently suffer from stress?
- Yes No Do you have diabetes?
- Yes No Do you experience frequent headaches?
- Yes No Are you pregnant?
- Yes No Do you suffer from arthritis?
- Yes No Are you wearing contact lenses?
- Yes No Are you wearing dentures?
- Yes No Do you have high blood pressure?
- Yes No If "yes" to previous question, are you taking medication for this?
- Yes No Do you suffer from epilepsy or seizures?
- Yes No Do you suffer from joint swelling?
- Yes No Do you have varicose veins?
- Yes No Have you ever had surgery?
- Yes No Do you have any contagious disease?
- Yes No Do you have osteoporosis?
- Yes No Do you have any allergies?

- Yes No Do you bruise easily?
- Yes No Have you had any broken bones in the past two years?
- Yes No Have you been in an accident or suffered any injuries in the past two years?
- Yes No Do you have tension or soreness in a specific area? Please specify: _____
- Yes No Do you have cardiac or circulatory problems?
- Yes No Do you suffer from back pain?
- Yes No Do you have numbness or stabbing pains anywhere?
- Yes No Are you very sensitive to touch or pressure in any area?
- Yes No Have you had surgery in the past five years? Explain below.
- Yes No Do you have any other medical condition or are you taking any medications I should know about?

Comments: _____

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.

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 that I am aware of. 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 Minors 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 _____

Body Map

Client: _____ Date: _____

Observations/Recommendations: _____

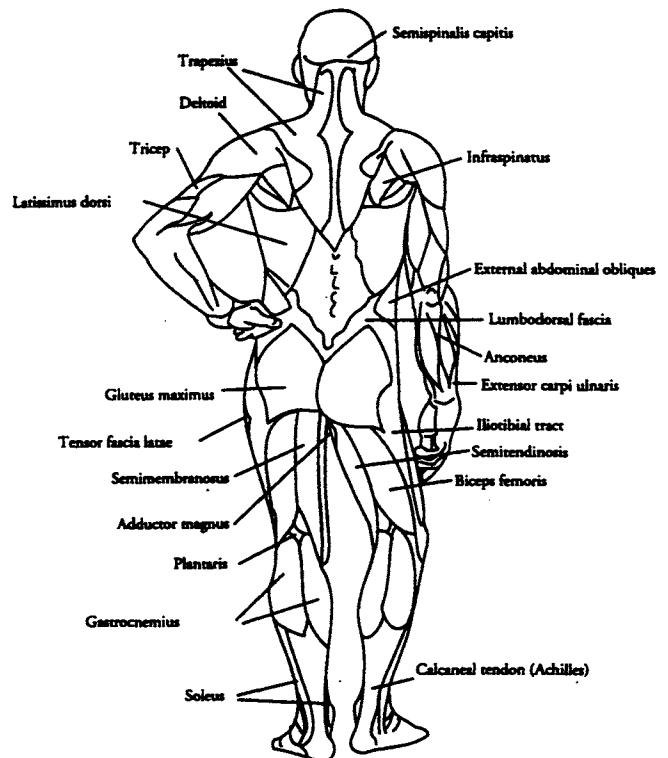
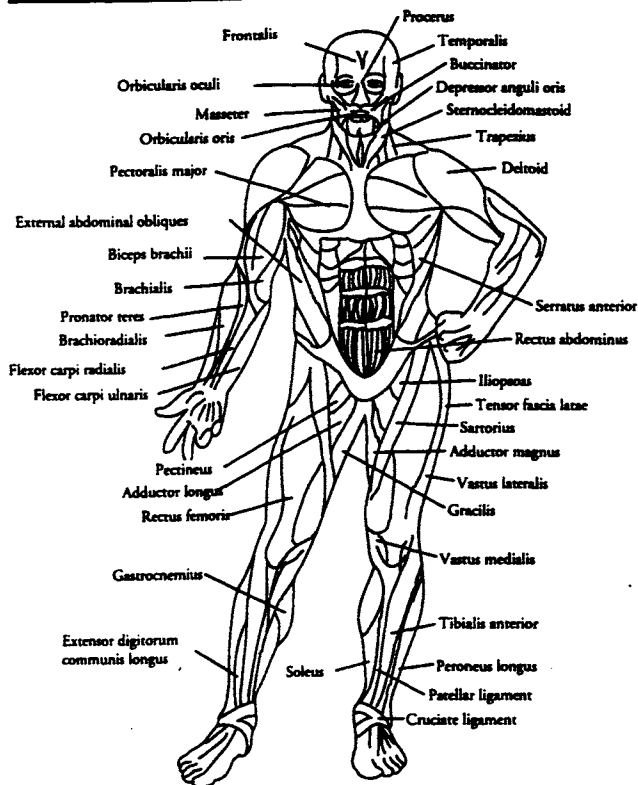
Range of Motion: _____ % Pain Threshold: High Low

Client Preferences: _____

Contraindications: _____

Indications: _____

- | | | | |
|--|--|---|--|
| <p>BACK</p> <ul style="list-style-type: none"> <input type="checkbox"/> TRAPEZIUS <input type="checkbox"/> QUADRATUS LUMBORUM <input type="checkbox"/> ERECTOR SPINAE <input type="checkbox"/> ILIOCOSTALIS <input type="checkbox"/> LONGISSIMUM <input type="checkbox"/> SPINALIS/SEMISPINALIS <input type="checkbox"/> MULTIFIDUS ROTATORES <input type="checkbox"/> INTERSPINALIS <input type="checkbox"/> INTERTRANSVERSARIJ <input type="checkbox"/> TERES MAJOR/MINOR <input type="checkbox"/> LEVATOR SCAPULA <input type="checkbox"/> RHOMBOIDS: MAJOR/MINOR <input type="checkbox"/> SUPRASPINATUS <input type="checkbox"/> INFRASPINATUS <input type="checkbox"/> SUBSCAPULARIS <input type="checkbox"/> SERRATUS POST/SUP/INF <input type="checkbox"/> LATISSIMUS DORSI <p>ARM</p> <ul style="list-style-type: none"> <input type="checkbox"/> BRACHIALIS <input type="checkbox"/> BICEP/TRICEP SUPINATOR <input type="checkbox"/> PRONATOR TERES <input type="checkbox"/> DELTOIDS: ANT/LAT/POST <input type="checkbox"/> CORACOBRACHIALIS | <p>HIP/LEG</p> <ul style="list-style-type: none"> <input type="checkbox"/> GLUTEUS MAX/MED/MIN <input type="checkbox"/> PIRAFORMIS <input type="checkbox"/> TENSOR FASIAE LATAE <input type="checkbox"/> GEMELIUS SUP/INF <input type="checkbox"/> TROCHANTERIC <input type="checkbox"/> OBTURATOR INT/EXT <input type="checkbox"/> QUADRATUS FEMORIS <input type="checkbox"/> PECTINEUS <input type="checkbox"/> PSOAS MAJOR/ILLACUS <input type="checkbox"/> SARTORIUS/GRACILIS <input type="checkbox"/> RECTUS FEMORIS <input type="checkbox"/> VASTUS INT/MED/LAT <input type="checkbox"/> ADD LONG/BREV MAG <input type="checkbox"/> BICEPS FEMORIS <input type="checkbox"/> SEMI-TEND/MEMBRANOSUS <input type="checkbox"/> SACROSPINALIS <p>LOWER LEG</p> <ul style="list-style-type: none"> <input type="checkbox"/> GASTROCNEMIUS <input type="checkbox"/> SOLEUS <input type="checkbox"/> PLANTARIS/POPLITEUS <input type="checkbox"/> TIBIALIS POST/ANT <input type="checkbox"/> FLEX/EXT DIGITORUM LONG/BR <input type="checkbox"/> FLEX/EXT HALLUCIS LONG <input type="checkbox"/> PERONEUS TERT/BREV/LON | <p>FOOT</p> <ul style="list-style-type: none"> <input type="checkbox"/> ABD/ADD HALLUCIS BREV <input type="checkbox"/> FLEXOR DIGITORUM BREVIS <input type="checkbox"/> ABDUCTOR DIGITI BREVIS <input type="checkbox"/> LUMBRICALS <input type="checkbox"/> QUADRATUS PLANTAE <input type="checkbox"/> FLEXOR HALLUCIS BREVIS <input type="checkbox"/> FLEXOR DIGITI MINIMI BREVIS <input type="checkbox"/> DORS/ PLAN INTEROSSEI <input type="checkbox"/> RETROCALCANEAL <p>NECK</p> <ul style="list-style-type: none"> <input type="checkbox"/> SPLENUS CAPITUS <input type="checkbox"/> SPLENUS CERVICUS <input type="checkbox"/> SUPRA INFRA HYOIDS <input type="checkbox"/> STERNOCLEIDOMASTOID <input type="checkbox"/> SCALENES ANTER/MED/POST <p>HEAD</p> <ul style="list-style-type: none"> <input type="checkbox"/> TEMPORALIS <input type="checkbox"/> MASSETER <input type="checkbox"/> ORBICULARIS ORIS/OCCULI <input type="checkbox"/> BUCCINATOR <input type="checkbox"/> PTERYGOID MED/LAT <input type="checkbox"/> TRANSVERSE NUCHAE <input type="checkbox"/> AURICULARIS POST/SUP | <p>CHEST</p> <ul style="list-style-type: none"> <input type="checkbox"/> PECTORALIS MAJOR/MINOR <input type="checkbox"/> SUBCLAVIUS <input type="checkbox"/> SERRATUS ANTERIOR <input type="checkbox"/> RECTUS ABDOMINUS <input type="checkbox"/> EXT/INT OBLIQUE <input type="checkbox"/> TRANSVERSE ABDOMINUS <input type="checkbox"/> INTERCOSTALS <input type="checkbox"/> RIBS <input type="checkbox"/> DIAPHRAGM |
|--|--|---|--|



REFERRAL FORM FROM PHYSICIAN

Patient Name _____ Ins. ID # _____ Date of Injury _____ Date _____
Diagnosis (include ICD-9 codes specifically addressing massage therapy care): _____

Direct and Indirect Areas of Concern:

cervical thoracic lumbar/lumbosacral
 cranial scapular upper extremities
 lower extremities other:

Precautions: _____

Condition is Related to: auto accident work injury general medical other: _____

Care Plan:

Rx Frequency: 1x/wk 2x/wk 3x/wk 1x/2wks 1x/4wks for _____ weeks.

Care Type:

massage hydrotherapy self care education

Specific Instructions: _____

Care Goals:

increase mobility increase strength restore function restore posture
 decrease pain decrease inflammation decrease muscle tension/spasms
 decrease compensational adaptation syndrome maintain associated structures

Additional Comments: _____

- Send report after initial visit.
- Send report at end of prescription.
- Send copies of chart notes at end of prescription.
- Fax information Mail information Call with information E-mail information

Physician's Signature _____ Date _____

Physician Name: _____

Address: _____

City/State/Zip: _____

Telephone: _____ E-mail: _____ Fax: _____

Competitive Market Analysis

Competitor: _____ Phone: _____

Location: _____

Length of time in Business: _____ Hours: _____

Services: _____

Brochure: _____ Price List: _____ Other Promotional Materials: _____

Date of Visit: _____ Proximity to my Location: _____

Overall how was your visit? _____

Rate the facility: 1 2 3 4 5 6 7 8 9 10 (1 poor => 10 excellent)

Initial Contact on Phone: 1 2 3 4 5 6 7 8 9 10 (1 poor => 10 excellent)

Professionalism: 1 2 3 4 5 6 7 8 9 10 (1 poor => 10 excellent)

Session Design: 1 2 3 4 5 6 7 8 9 10 (1 poor => 10 excellent)

Technique Application: 1 2 3 4 5 6 7 8 9 10 (1 poor => 10 excellent)

Ambiance: 1 2 3 4 5 6 7 8 9 10 (1 poor => 10 excellent)

Price/Value: 1 2 3 4 5 6 7 8 9 10 (1 poor => 10 excellent)

What kind of clientele? _____

Strengths: _____

Weaknesses or Limitations: _____

Other Comments on Visit: _____

Completed by: _____

WORKSHEET: PERSONAL EXPENSES

<i>REGULAR MONTHLY</i>	Estimated Monthly Cost	x 12
Housing: Rent/ Mortgage	\$	\$
Utilities: SDG&E, Water, CableTV, other	\$	\$
Utilities: Phone	\$	\$
Auto: Payments, gas	\$	\$
Food: Groceries	\$	\$
Food: Dining out	\$	\$
Household supplies	\$	\$
Clothing: Purchase & cleaning, etc.	\$	\$
Entertainment	\$	\$
Contributions	\$	\$
Personal Care: Hair, toiletries, etc.	\$	\$
Health: Club membership, supplements, etc.	\$	\$
Miscellaneous Cash	\$	\$
Education, Books & publications	\$	\$
Savings	\$	\$
Debt:	\$	\$
Loans-Payments & interest	\$	\$
Credit Cards-Payments & finance charge	\$	\$
TOTAL REGULAR EXPENSES:	\$	\$

<i>PERIODIC EXPENSES</i>	divide by 12	Annual Cost
Insurance:	\$	\$
Health	\$	\$
Life	\$	\$
Long Term Disability	\$	\$
Homeowner/Renter	\$	\$
Auto:	\$	\$
Registration	\$	\$
Repair/Maintenance	\$	\$
Health:	\$	\$
Medical	\$	\$
Vision	\$	\$
Dental	\$	\$

Miscellaneous	\$	\$
Gifts & Holidays	\$	\$
Travel	\$	\$
Home:	\$	\$
Repair	\$	\$
Maintenance	\$	\$
Property Taxes	\$	\$
Retirement:	\$	\$
IRA	\$	\$
SEP/KEOGH	\$	\$
TOTAL ANNUAL PERIODIC:	\$	\$
	<i>Monthly</i>	<i>Annual</i>
TOTAL EXPENSES:	\$	\$

**Future Tax Strategy Advisor
Starting a Business**

**For Tax Year
2003**

Name(s) Shown on Return

Social Security Number

Starting a new business can be exciting. It is also accompanied by numerous changes in your tax situation.

The Future Tax Strategy Advisor will provide you with valuable information about getting your business up and running.

And when its time to file your tax return next year, TurboTax will guide you through the entire return and help you complete all tax forms necessary for your new business.

Contents

- I. When to Get a Tax ID Number**
- II. Accounting for Your Business in the First Year**
- III. Employees or Contract Workers**
- IV. Quarterly Tax Payments**
- V. Deductions That Require Special Recordkeeping**
- VI. Retirement Savings Options**
- VII. Home Office**
- VIII. Resources for Additional Information**

- I. When to Get a Tax ID Number**
 - A.** You don't need to apply for an employer identification number (EIN) unless you hire employees or set up a retirement plan for your business.
 - 1. If you need to apply for an EIN, use Form SS-4 available in TurboTax.
 - 2. You can also request an EIN by phone (FAQs in TurboTax provide the phone numbers.)
 - B.** If you hire employees and need to prepare Forms W-2 at the end of the year, the Home and Business version of TurboTax will help you.
- II. Accounting for Your Business in the First Year**
 - A.** Keep your business and personal transactions separate:
 - 1. The IRS looks more favorably on business records that don't have personal items mixed in.
 - 2. Set up separate bank and credit card accounts for your business transactions. If you do use a credit card for both business and personal transactions, indicate on the credit card statement which items are business-related and save your monthly statements with your business receipts.
 - B.** Accounting methods:
 - 1. Select **Cash Method** if you want to record income when you receive payments and record expenses when you pay them.
 - 2. Select **Accrual Method** if you want to record income when it's earned instead of collected and record expenses when they are incurred instead of paid.
 - 3. TurboTax contains additional information on selecting an accounting method.
 - C.** Business expenses paid by credit card:
 - 1. Credit card purchases are basically treated the same as cash purchases.
 - 2. If you use your credit card to pay for business expenses, deduct the expenses in the year you charge them, not in the year you pay the credit card bill.
 - D.** Business machinery and equipment:
 - 1. Depreciate the cost of your assets over several years instead of deducting them entirely in the year you buy them.
 - 2. IRS code Section 179 allows you to deduct up to \$25,000 for purchases of equipment, furniture, and other business-related assets in the year of purchase instead of depreciating the cost over a number of years.

E. Start-up Costs:

1. Keep track of any costs you incur before you open your doors for business. Even though they are not fully deductible in the first year, you can deduct start-up costs the same way you depreciate an asset.

III. Employees or Contract Workers

A. If other people work for your business, they will be categorized as either employees or independent contractors. It's important to distinguish between employees and independent contractors.

1. Test for distinguishing employees from independent contractors:

- a. If you direct their hours and provide equipment for the workers, they are considered employees.
- b. If they are free to set their hours and have their own equipment they are considered independent contractors.

B. The IRS is interested in how you classify your workers since you aren't required to pay payroll taxes for independent contractors.

1. You must provide independent contractors a Form 1099-MISC if you pay them more than \$600 during the year.
2. You are not required to provide a Form 1099-MISC to corporations.
3. Remember to get social security numbers and addresses from contractors when you hire them.
4. You must provide employees a Form W-2 to report their annual wages and payroll taxes.
5. The Form W-2/1099 Reporter, available in the Home and Business version of TurboTax, can prepare the necessary Forms W-2 and 1099-MISC for you.

C. For more information, see IRS Publication 15-A - Employer's Supplemental Tax Guide, available at www.irs.gov/forms_pubs/pubs.html.

IV. Quarterly Tax Payments

A. If self-employment is new to you, you'll need to know how to pay your taxes quarterly. Use estimated tax payment vouchers (Form 1040_ES) to send the IRS your payments. TurboTax will prepare these vouchers for you.

B. There is often the potential for a tax loss in your business' first year due to equipment purchases and start-up costs. A tax loss in the first year provides you with a significant tax break when it's offset against other taxable income such as wages and investment income. If you have a loss you probably won't need to make quarterly tax payments.

C. Use the planning section in TurboTax to estimate your 2003 taxes. TurboTax will prepare any necessary tax payment vouchers. See the "Estimated Tax Payments" section.

V. Deductions That Require Special Recordkeeping

A. Business meals and entertainment expenses:

1. The IRS often looks closely at these expenses. Make sure to record the business purpose for incurring the expense on your receipts.
2. Meals and entertainment expenses must clearly be related to your business to be deductible.
3. An alternative to recording information on receipts is to use your appointment book to record meetings and the related business purpose.
4. No matter how you choose to record your business information, it's important to keep your receipts organized. Save all receipts with your tax records.

B. Automobile/Mileage expenses:

1. Keep a log of your daily business miles. Record the business purpose, number of miles traveled, and the date.

2. You can deduct either your actual auto expenses (gas, repairs, insurance, lease, etc.) or take the standard allowance of 36 cents/mile.
 - a. TurboTax will help you select the most advantageous method for deducting your auto related expenses.
 - b. If you want to use the standard mileage rate in the future, you must use this method for the first year. You can switch to actual expense method in the future if it results in a larger deduction.
 - c. If you lease a car for business and choose to use the standard mileage method in the first year, you must continue using this method for the entire lease period.

VI. Retirement Savings Options

- A. Self-employment offers you additional options for saving for retirement. Plans available to the self-employed provide a great way to save on taxes.
- B. Advantages of self-employed retirement plans:
 1. you can deduct contributions you make for yourself
 2. earnings are tax-free until distributed
 3. some self-employment plans allow much larger contributions than plans available to employees
- C. Most financial institutions can set up a plan for you.
- D. Common plans:
 1. SEP-IRA (Simplified Employee Pension)
 - a. SEP-IRAs (Individual Retirement Arrangements) can be set up for yourself and your employees
 - b. due date for setting up your plan is the same as the due date of your tax return
 - c. you are required to include your employees in the plan
 - d. contributions must be made by the due date for your tax return
 2. SIMPLEs (Savings Incentive Match Plans for Employees)
 - a. employees making at least \$5,000/year must be covered
 - b. employers must make annual contributions on behalf of employees
 - c. employees can make contributions to the plan based on a percentage of their salary
 - d. Plans must be set up by October 1st for the applicable year
 3. Other plans:
 - a. Keogh
 - b. Money purchase plan
 - c. Profit sharing plan
 - d. Defined benefit plan
- E. For additional information on retirement plans for the self-employed, see IRS Publication 560 - Retirement for Small Business, available at www.irs.gov/forms_pubs/pubs.html.

VII. Home Office

- A. A home office gives you additional tax benefits by allowing a portion of personal expenses (such as utilities and housekeeping) to be deducted as business expenses.
- B. Home office expenses are deducted based on the ratio of the area of your home office to the total area of your home.
- C. To qualify, your home office must be used exclusively for business and as the primary location for managing your business.
- E. For additional information, see IRS Publication 587 - Business Use of Your Home, available at www.irs.gov/forms_pubs/pubs.html.

VIII. Resources for Additional Information

- A. Use your current version of TurboTax for additional information. Review the Business Income (Business, Rental or Farm income) and Planning sections in Interview along with TurboTax's extensive Help and FAQs. The Home and Business version of TurboTax has even more information for sole-proprietors.
- B. See IRS Publication 334 - Tax Guide for Small Businesses, available at www.irs.gov/forms_pubs/pubs.html.

MAXIMIZING YOURSELF

***Affirmations
Avoiding Burn-out
Resources***

Financial Affirmations for Affluence

- * I honor my integrity in all I do.
- * I congratulate myself often.
- * I give myself permission to have what I want.
- * My beliefs create my reality.
- * I choose beliefs that bring me aliveness and growth.
- * My value and worth are increased by everything I do.
- * My fears are the places within me that await my LOVE.
- * I speak of success and prosperity.
- * I live in an abundant world.
- * The Universe is safe, abundant and friendly.
- * I expect only the best to happen, and it does.
- * I accept prosperity and abundance into my Life.
- * I am linked with the unlimited abundance of the Universe.
- * As I do what I love, money and abundance flow freely to me.
- * I am alert to my opportunities, and I use them well.
- * I let go easily, trusting that nothing leaves my life unless something better is coming.
- * I create what I want easily and effortlessly.
- * I am abundantly provided for as I follow my Path.
- * People value and honor my work.
- * As I give, I receive.
- * The greatest gift you give others is the example of your own Life working.
- * My prosperity prospers others.
- * I have abundance in every area of my Life.

Strategies To Overcome Barriers

- * Clarify your values and live your values
- * Be attentive to your personal process
- * Do self evaluating, clearing, counseling, if necessary.
- * Become aware of your conscious and unconscious agendas
- * Set clear goals
- * Focus on your goals not the barriers
- * Become a calculated risk taker
- * Be informed and involved in your profession
- * Keep balanced
- * Learn from your past
- * Know your career is built one step at a time
- * If you are repeating your negative past, get help
- * Create a positive support system
- * Keep things in perspective
- * Create, affirmations to neutralize your barriers
- * Nurture your self
- * Ask for help-utilize mentors, advisors, colleagues
- * Continue your professional growth
- * When it gets hard, or fear and frustration comes up, recommit to your work
- * Pay yourself-salary, benefits, insurance, and investments for your future
- * Cultivate acceptance and non-judgment
- * Live in gratitude
- * Be willing to let your work be a process, not an event
- * It will go up and it will go down. When it goes up, you are not done; when it goes down it's not the end of your work. Feel the emotion but don't get invested in it.
- * Play a little everyday. Have fun.

Professional Growth Through Supervision

Many massage therapists find they need someone to help them sort out the behaviors and feelings they experience while interacting with clients. They get this help from supervision—that is, a process of learning by discussing work experiences with peers or a more experienced therapist.

Massage therapists can use any of three kinds of supervision:


1. **School clinic supervisor**—This type of supervision usually focuses on the notes written after the student/client session. It may or may not be technique related. These supervisors help students understand where the students need to develop, or grow.
2. **Group supervision**—This involves a group of massage therapists coming together to talk through client issues they are experiencing. The therapists offer advice to each other based on their own experiences.
3. **Professional supervision**—A trained mental health professional who knows the theory of client-therapist relationships acts as a guide through a massage therapist's self-examination of professional issues. Ideally, a professional supervisor is trained in massage and the relationship issues it can bring out.

Because of the confidential nature of massage, the actual supervision is done outside the session. Supervision can help with many of the client issues that massage therapists encounter, from client hygiene or lack of cooperation, to a therapist's anger or other feelings aroused by a client's behavior. The supervisor also can help the massage therapist address particular issues related to specific client types. Supervision issues may fall into three categories:

1. the client-therapist relationship
2. what is occurring with the client psychologically and physically
3. what is occurring with the massage therapist psychologically and physically

Supervisors who have more experience can provide options for how a massage therapist can handle a situation the next time it arises.

When you are looking for a supervisor, keep in mind that different states have different qualifications for supervision. For example, Oregon's mental health board keeps a list of professional supervisors from the mental health field who are certified by the state. Check with your state board for such a list, or look for a counselor who is trained in massage. Also, note that the expense of paying for a supervisor generally is tax deductible.



All I Really Need to Know I Learned in Massage School

- ☞ Be punctual, prepared and keep good notes. Wash your hands. When you are ready, the perfect teacher will arrive. Knowledge of Greek and Latin prefixes is beneficial. Don't panic, tests are for your own growth—if you falter you can, and will, repeat the lesson. Nurture your Self. Strength lies in balance. Receive massage. Eat your vegetables. Drink plenty of water. Be cheerful. Exercise daily. "Ohm," "Aah," or just be still. Wear comfortable shoes.
- ☞ Create a peaceful environment. Nourish the senses; aromatic candles, meditative music and cotton flannel sheets. Every body is sacred. Be reverent. Warm your hands. Warm the room. Warm your heart. Talk less, listen more. Live open-minded. Beware of your prejudices. Refuse gossip. Value confidentiality. Be honest. Presence and intention are paramount. Wholeheartedly attend the moment. The lightest touch can heal.
- ☞ Transition with ease and grace. Spirit each move. Individual responses vary. Deep pressure. Gentle rocking. Embrace the difference. Stretch. Don't pretend to be an expert on that which you are not. Never force. Never rush. "How's the pressure?" Care. Pain is subjective. Laughter is healing, so are tears. The body remembers. It's never too late to ice it. Forgive. Forgive yourself.
- ☞ Practice, practice, practice. Challenge rules. Welcome possibilities. There is no routine. Let it flow. Create. Dance. Don't forget to breathe. Deeply. Relax. Shoulders down. Knees loose. Move from your center. Trust intuition. The mind thinks, the heart knows. Believe in others. Believe in yourself and in your profession. Believe in a force greater than yourself.
- ☞ Be gentle, be strong, be willing and the healing power of creation will flow through to benefit all you touch. From atom to universe we are whole and all are connected. Honor all. Judge no one. Offer freely to those in need. Continue to learn. Share your knowledge. Respect. Expect respect. Strive to grow, every day. Be open to prosperity. Accept tips. Be grateful. Follow up and follow through. Success walks a determined step. Clarify aspirations. The path will clear. Dream specifics. Doors will open. Dream big. Thoughts manifest. Never give up. Never lose hope. And above all else ... LOVE, LOVE, LOVE.

—Jo Sodano