

Transcript of Lesson 1 Lecture Video

2026 Cultural Competency for the Professional Massage Therapist and Bodyworker and All Healthcare and Wellness Professionals. 1 CE Contact Hour/Cultural Competency

1:07:01 hours, minutes, seconds

9355 words, 30 pages.

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Instructor

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0:00:00 Welcome to 2026 Cultural Competency for the Professional Massage Therapist and Bodyworker and All Healthcare and Wellness Professionals.

This is Steve Davis, your instructor.

This course is an Interactive Distance Learning Course for Continuing Education Contact Hours in Cultural Competency. The length of this course is one hour.

I will be going through the requirements to pass the course and I hope that you enjoy it.

We are going to make this very simple and yet thorough, in one hour.

Your participation in our [Private Forum](#) is mandatory for your Contact Hours. I am asking you to write at least two posts in our Private Forum.

I put the subject of Cultural Competency in our [Ethics Private Forum](#). We also have the [Science Private Forum](#), and you are welcome to post in either one, because this topic is very important, and it does apply to everything that we do.

You will find on your course page the [login instructions and course page instructions](#). Please read through that, and also on that page, you will find the links to all of the courses that I offer, the product pages, and another page that has every single link including the lesson pages and all instructions in one place.

I hope that you will take advantage of those resources to navigate through the site.

During the course and afterwards keep in touch with other students and myself in our Ethics Private Forum. We have a topic that I have started called [Cultural Competency 2023-2026](#).

You are welcome to start other topics. Use the key word Cultural Competency. You can easily find these topics by using the search box at the top of the page. On the computer it will be at the top left, and on the tablet or phone it will be at the very top of the screen.

Type in your search term Cultural Competency or any other search term that you would like to put in, and all topics and replies will come up for that subject.

We have hundreds of students on our site, now over 1800, and there are thousands of posts in our Private Forum already. A lot of this has already come up because it is very relevant to what we do as Healthcare and Wellness Professionals.

Please remember to subscribe to the Private Forum. The subscribe link is right at the top under the Private Forum title. By subscribing to the Private Forum, you will be able to see new posts and to be able to reply to them. Also, you can subscribe or unsubscribe to topics that you are following or wish to stop following.

Make sure to check the box that says notify me by email of any replies when you are writing your posts.

It is very simple to post. There are instructions also in how to post on the Login Instructions and CE Course Instructions page.

If you are not logged in to the site, it will return an error message: Page not found!

Please participate in our Interactive Private Forum with other students and the instructor, yours truly.

For Contact Hours, you must participate in the Interactive Distance Learning environment. Check your licensing requirement please.

Remember, we are colleagues supporting each other in our field of health, wellness, and performance. Communication among colleagues is a very important aspect of Cultural Competency.

As I mentioned, the estimated time to finish the course is one hour. The structure is [Lesson 1](#), the [quiz for Lesson 1](#), and write at least two posts in our Private Forum. You are certainly welcome to write more, and there is no time limit. You can keep participating forever, as long as I am around, and the site is around. It will keep going.

I want to build a community because it is very important for all of us to help each other, to help our clients or patients.

You must pass the multiple-choice exam with an 80 percent score or higher. There are 5 multiple choice questions on the content presented in this course.

You can reset it as many times as you want to, just take it again. If you don't pass, just reset it and take it again. It will say RESET QUIZ. When you take the quiz, there is a button that says COMPLETE QUIZ. Make sure that you click on that. Your score will be automatically calculated by the system.

As I said, the course is offered as an Interactive Distance Learning Course that you can take at your leisure on your own schedule. You must participate in our [Private Forum](#) for your Contact Hours requirement in our Interactive Distance Learning Course environment.

There are also [many valuable resources available in Lesson 1](#) and in our [Private Forum](#).

We have lots of people who are actively helping each other. I hope that you will take advantage of our community of professional colleagues.

This is a Private Forum. It is not social media. Please don't share any posts that you find here. They are only for us, and for registered students in these courses. Thank you.

0:05:47 Let's go over the laws that pertain to this requirement for Cultural Competency Continuing Education Courses for the 23 Licensing Boards.

This requirement is covered under Oregon Revised Statute 676.850. 676 is Health Professions Generally.

The other one is Oregon Revised Statute 413.450. Chapter 413 is Oregon Health Authority, and Human Services, Juvenile code, Corrections, and Oregon Health Policy Board. There is a specific section as I mentioned, the .450 section, which I will read right now.

0:06:38 413.450 Continuing education in cultural competency.

(1) The Oregon Health Authority shall approve continuing education opportunities relating to cultural competency.

(2) The authority shall develop a list of continuing education opportunities relating to cultural competency and make the list available to each board, as defined in ORS 676.850.

(3) The continuing education opportunities may include, but need not be limited to:

- (a) Courses delivered either in person or electronically;
- (b) Experiential learning such as cultural or linguistic immersion;
- (c) Service learning; or
- (d) Specially designed cultural experiences.

(4) The continuing education opportunities must teach attitudes, knowledge and skills that enable a healthcare professional to care effectively for patients from diverse cultures, groups and communities, including but not limited to:

- (a) Applying linguistic skills to communicate effectively with patients from diverse cultures, groups and communities;
- (b) Using cultural information to establish therapeutic relationships; and
- (c) Eliciting, understanding and applying cultural and ethnic data in the process of clinical care.

(5) The authority may accept gifts, grants or contributions from any public or private source for the purpose of carrying out this section. Moneys received by the authority under this subsection shall be deposited into the Oregon Health Authority Fund established by ORS 413.101.

(6) The authority may contract with or award grant funding to a public or private entity to develop the list of or offer approved continuing education opportunities relating to cultural competency. The authority is not subject to the requirements of ORS chapters 279A, 279B and 279C with respect to contracts entered into under this subsection.

Now, that's very important. There is also a note under 413.430.

It's important to know the law, to follow it, and not to break it.

One moment, and I will read the other chapter.

I am reading through this, so that we have a good understanding of what is required for us legally.

Chapter 676, as I mentioned, is Health Professions Generally.

That is the Oregon Revised Statute, and

0:09:03 676.850 is the authority of regulatory boards to require cultural competency continuing education; documentation of participation and rules.

You can do quick searches to go through this and know your legal responsibilities.

There are 8 mentions of the title (676.850). What it boils down to is Cultural Competency Continuing Education. There are 23 Licensing Boards that fall under this statute in the State of Oregon.

CULTURAL COMPETENCY CONTINUING EDUCATION

676.850 Authority of regulatory boards to require cultural competency continuing education; documentation of participation; rules. (1) As used in this section, "board" means the:

- (a) State Board of Examiners for Speech-Language Pathology and Audiology;
- (b) State Board of Chiropractic Examiners;
- (c) State Board of Licensed Social Workers;
- (d) Oregon Board of Licensed Professional Counselors and Therapists;
- (e) Oregon Board of Dentistry;
- (f) Board of Licensed Dietitians;
- (g) State Board of Massage Therapists;
- (h) Oregon Board of Naturopathic Medicine;
- (i) Oregon State Board of Nursing;
- (j) Long Term Care Administrators Board;
- (k) Oregon Board of Optometry;
- (L) State Board of Pharmacy;
- (m) Oregon Medical Board;
- (n) Occupational Therapy Licensing Board;
- (o) Oregon Board of Physical Therapy;
- (p) Oregon Board of Psychology;
- (q) Board of Medical Imaging;
- (r) State Board of Direct Entry Midwifery;

(s) State Board of Denture Technology;

(t) Respiratory Therapist and Polysomnographic Technologist Licensing Board;

(u) Home Care Commission;

(v) Oregon Health Authority, to the extent that the authority licenses emergency medical service providers; and

(w) Health Licensing Office, to the extent that the office licenses lactation consultants.

(2)(a) In collaboration with the Oregon Health Authority, a board may adopt rules under which the board may require a person authorized to practice the profession regulated by the board to receive cultural competency continuing education approved by the authority under ORS 413.450.

(b) Cultural competency continuing education courses may be taken in addition to or, if a board determines that the cultural competency continuing education fulfills existing continuing education requirements, instead of any other continuing education requirement imposed by the board.

(3)(a) A board, or the Health Licensing Office for those boards for which the office issues and renews authorizations to practice the profession regulated by the board, shall document participation in cultural competency continuing education by persons authorized to practice a profession regulated by the board.

(b) For purposes of documenting participation under this subsection, a board may adopt rules requiring persons authorized to practice the profession regulated by the board to submit documentation to the board, or to the office for those boards for which the office issues and renews authorizations to practice the profession regulated by the board, of participation in cultural competency continuing education.

(4) A board shall report biennially to the authority on the participation documented under subsection (3) of this section.

(5) The authority, on or before August 1 of each even-numbered year, shall report to the interim committees of the Legislative Assembly related to health care on the information submitted to the authority under subsection (4) of this section.

OK, so there you have it. It's pretty simple. Well, there is more. What I am going to do is that I am going to put all of this into the Lesson page and let you read it.

I am going to read another section that is very important, that relates to the course approvals.

Let's get to that right now. And then we will get into the core of this course.

0:13:38 There is a section of the Oregon Health Authority called the Office of Equity and Inclusion.

It is part of the Oregon Health Authority. They have put out a bulletin about the Continuing Education requirement for Cultural Competency. They call it Cultural Competence Continuing Education brief.

It's only two pages long. I am going to put that in the Lesson too, so you know what is happening.

There is a section that states an answer to a question.

Question: If the Cultural Competence training that I take is not on the Oregon Health Authority (OHA) approved list, will I be in violation of the new law?

Answer: No. It is not legally required that the Cultural Competence training Healthcare Professionals take come from the OHA approved list.

OK. However, I am planning on getting my course on that list, because it should be on that list.

Question: What are the benefits of taking Cultural Competence training from the OHA approved list?

Answer: The purpose of creating the list is to provide Cultural Competent CE (Continuing Education) opportunities that have met specific criteria for high quality of a standard of excellence in Cultural Competency Education.

You can get that list and they have a link to it, and it mentions the boards that are affected by it. As I said, there are 23 boards. The Oregon Board of Massage Therapists is one of the 23 boards that are under the authority of the Oregon Health Authority, which I call OHA, or OHA.

0:15:26 Now, I would like to read the criteria for approval by the Oregon Health Authority, OHA, Office of Equity and Inclusion for Cultural Competency, or Cultural Competence. They use that word interchangeably.

Continuing Education Training. This is dated May 2019.

There are four domains. It has to meet all four domains. We are going to do that in this course.

Domain 1.

The culturally competent practice requires self-awareness and self-assessment of providers beliefs, attitudes, emotions and values.

And it has these four parts to it.

Training opportunity teaches about cultural factors that may influence provider and patient's behaviors.

Training opportunity helps to foster a non-judgmental and respectful environment during health encounters between provider and patient.

Training opportunity teaches relationship between cultural competence and ethics.

Training opportunity explores concepts of power, privilege and oppression across personal identities and the intersections among these identities (e.g. racial, ethnic, culturally-based, LGBTQ, people with disabilities, limited English proficient, etc.).

As you know, as you should know, I have been teaching Ethics for the Professional Massage Therapist and Bodyworker since 2017. This is now 2024.

We have over 1600 students on my site, most of whom have taken that course. We have very robust discussions, and people are very appreciative of that 4 CE Contact Hour Course that I put together.

To me, Cultural Competence absolutely intersects with Ethics. We have many discussions in our Private Forum that address these different issues that people are talking about, that the OHA, Oregon Health Authority is talking about in Domain 1.

Let's move on to **Domain 2**.

Culturally competent practice requires the acquisition of knowledge by providers.

Knowledge is in red.

*In Domain 1, the red text says **self-awareness**.*

***Self-awareness** is in Domain 1. **Knowledge** is in Domain 2.*

And then we have five sections in Domain 2, which I will read.

Training opportunity demonstrates understanding of cultural competence as a developmental, life long, participatory process, not an endpoint.

In other words, you are always improving. You are always studying your behavior, and how you can do better. I am going to get into that in detail shortly.

Training opportunity provides a broad and inclusive definition of diversity, even if it focuses on a specific Population.

Many people as Massage Therapists have their target demographic in Massage Therapy, and I am also including others. We have 23 Licensing Boards, so it depends on what you are doing, if you have a certain population that you are serving, then that may apply to you.

The way that I run my practice; I am open to everyone who walks in the door.

Except if there is a contraindication to my treating them. I am going to go through my Studio Policy and exactly what I do, just after I read these rules.

Now we have the next part.

Training opportunity demonstrates knowledge of legal, regulatory (i.e. patient rights & responsibilities, risks to practice-civil rights act, ADA, CLAS, Joint Commission requirements,

etc.) and accreditation issues of diversity and linguistic issues and providers' professional standards regarding cultural competence.

ADA is the Americans with Disabilities Act.

CLAS is Culturally and Linguistically Appropriate Services.

I will put more information about these requirements on the Lesson page.

You have to know all these legal terms, and that's why I am going through the laws in this course, because you must know what your legal responsibilities are, and also for Patient's rights and responsibilities.

Both sides.

Training opportunity demonstrates knowledge of health disparities and social determinants of health.

Now that is something that is very important to understand. For example, how people are impacted by their lifestyle, or perhaps their age and other factors.

Training opportunity demonstrates knowledge of culturally-based information and related resources specific to Oregon.

Alright. Obviously, we can go through into depth on each one of these sections of Domain 2.

*Let's move on to **Domain 3**.*

Culturally competent practice requires the acquisition of skills by providers.

The word Skills is in red text.

We have four parts to this Domain.

Training opportunity demonstrates how to collaborate with patients and/or stakeholders in making health care decisions.

It always comes down to the patient or to your client; it's their decision.

They are in charge of their own health. Or, it could be their legal guardian or caretaker.

Training opportunity demonstrates how to develop and/or utilize communication tools/multiple patient education formats (including translated, audio and visual materials) and patient assessment strategies (e.g. patient- and family-centered communication, patient's perception of his/her health, patient preferences, etc.).

And I would say that the gender language should be replaced by their, to a non-specific gender. But that's just me. I am looking at what the Oregon Board of Massage Therapists has in their rules. They are taking out gender language.

Training opportunity demonstrates how to collect and utilize data to inform clinical practice related to health equity, (including recognition of institutional cultural issues).

We are going to think about each one of these.

Training opportunity demonstrates how to collaborate effectively with community resources, stakeholders, traditional health workers (THWs), qualified/certified health care interpreters (HCIs), providers, and other types of healers.

There are more things to think about. The skills, multimedia, and technology that you might be employing, and how to collect and utilize data.

Your client records are really important.

For every client that you find, or every potential new client or patient; I hope that you will take a thorough health history, thorough medical history. And also, for your existing patients or clients that you will be keeping up those records at regular intervals. At any time that things change, you are going to be documenting that change.

I certainly do in my practice. I use the S.O.A.P. method for my charting notes. Culturally Competent, and everything has to be HIPAA-compliant, of course.

Domain 4.

Culturally competent training requires specific educational approaches for acquisition of knowledge and Skills

Educational approaches are in red text.

It has four sections.

Training opportunity is delivered through facilitated learning processes (e.g. interactive training involving case review; homework; discussion group/blog; interactive test with trainer/facilitator; post-training to demonstrate what was learned; etc.).

Training opportunity uses a variety of collaborative, inclusive and accessible teaching methodologies

consistent with adult learning principles (self-directed, goal oriented activities based on participant experiences in order to gain new forms of knowledge, skills, attitudes, or values).

Yes, I certainly do that at my learning portal, always. I have been teaching for many years. I will show you my record shortly here, what I have done in my life.

I totally agree with this. All of these things are great.

Training opportunity is evaluated to assess impact on participants and efficacy of trainers, with clear description of criteria for participant completion.

I am always open to feedback, and you will see that I have all five-star ratings on all of my courses, since the get-go, from the beginning. I am always improving what we are offering.

Training opportunity incorporates the principles of privilege, power, oppression, bias, and the guiding principles of cultural competency.

We go through all that, and I am going to apply things we have learned and applied in the Ethics courses, and also in yoga.

Yoga is a great philosophy. The 8 limbed path of yoga.

I am going to apply my Studio Policy, Code of Ethics, and other ways to approach this that are going to simplify it.

You want to make this simple. There are a lot of words here. I have been reading all these legal requirements, and it sounds very complicated, but it really is not.

It is not complicated at all.

And now, down here at the bottom of this document we have the following.

For simplification, the terms “provider” and “patient” represent the broadest spectrum of roles in health care, including but not limited to: physician, social worker, medical technician, etc.; and patient representative, client, resident, consumer, patient’s family and community, etc., respectively.

You might have other impacted parties besides the healthcare provider and the patient, sometimes we call them the client. You might have family members or other people who are also involved.

0:26:17 Let’s talk about S.M.A.R.T.

That is a teaching and learning method. S.M.A.R.T. means Specific, Measurable, Achievable, Relevant, and Time-Bound.

S.M.A.R.T.

How are my courses meeting that criteria?

Specific. We have learning objectives and learning outcomes for each of the courses. This is set by the NCBTMB Approved Provider program. That is the National Certification Board for Therapeutic Massage and Bodywork.

I have to meet those criteria as a Board Approved Provider of Continuing Education. NCBTMB APCE.

I am also Board Approved in Therapeutic Massage and Bodywork, BCTMB, and there are very strict requirements for that credential that I have to meet.

I am going to mention all of these things. I think it is very important to have accountability, and to be specific about what you are learning, what you are doing, and have that information available for your client or patient, too, because it is important to have good communication, actually excellent communication.

To me, that is what this is all about. It is about really good communication. Being very clear in your intentions.

Every thought, word, and action must be true. You have to state what you are going to do so people can understand you. If they cannot understand you, then perhaps you need an interpreter, or you just need to repeat it.

Repetition can help quite a lot.

I have found this to be effective in the years that I have been teaching, and I have been teaching since 1971. Teaching yoga and teaching other courses. We will go through my CV, Curriculum Vitae. I have had a very long career in teaching courses. Continuing Education courses to professionals.

Getting back to this S.M.A.R.T.

Specific. Yes, very specific. We are going to learn about how you can meet these requirements, legal requirements, and ethical and moral requirements of Cultural Competency in your Healthcare Profession in a very simple, straight-forward way.

Measurable. Yes, they are, because you are going to find out your results, and measurable course content, objectives, and outcomes. You have to pass the test. You have to pass the multiple-choice exam, and you have to demonstrate that you are able to write and communicate with our colleagues, our professional colleagues, in our Private Forum. That is measurable.

Achievable. This depends on you. Each one of us. We are all students and we are all teachers. We are all learning from each other, and we are teaching each other, in every interaction.

It is important to respect everyone equally. That is one of my core principles.

Respect all equally. Every person and every living being is equal. No one is more equal than others.

Relevant. Yes, it's always relevant. I would say that this topic, this course, is absolutely evergreen, and relevant, to all cultures, and all societies throughout history.

It is nothing new. Perhaps people are becoming more aware that things have not been done correctly.

It is relevant to have Cultural Competency.

There are consequences. If someone is upset and they are not going to follow your instructions, then they are not going to get the benefit of how you are able to help them.

They are not going to take their medicine, if you are a doctor and you are prescribing medicine, or, they are not going to do their exercises; it depends on what you are teaching, what you are doing with them.

Time-bound. That, for me, for what I do, I don't put a time limitation on people. You have as much time as you need to complete the course.

Of course, there is a deadline for your professional license renewal. You will have to meet that deadline.

As far as pressure to get the course done quickly, I don't believe in that. I will not impose that, because I want you to learn, thoroughly, everything I am teaching, and have the opportunity to communicate with your professional colleagues and learn from them, because this is important for all of us, to keep those lines of communication open, and have your heart open, and learn about what it means to be a human being.

0:31:08 Learn about love, and the truth, helping people to be well, and to have a healthy life.

That's what all Healthcare Professionals should be aspiring to, which is to help people to be as healthy as they can be, and to have an enjoyable life, and to meet their requirements of what they would like to do in their life, to the best of their ability.

It is simple, really. It should be.

My lessons are timeless, evergreen, always current, and relevant to the times and to the Healthcare Professional.

No time pressure as I mentioned, other than the deadline of completing it by your license renewal deadline. In most cases, that is once every two years.

I encourage people to take their time, and as I said, in that way they will learn properly.

I am building a community of Professional Colleagues who are free to return to this Continuing Education Course material forever.

There is no time limit. You don't have an expiration date. You don't have to pay to come back. You are welcome all the time. We have a community.

That's how I want to do it. That's how I have been doing it.

0:32:23 Studio Policy

What I have done, with my Studio Policy, is to combine the forms of the [Price List, Studio Policy, and the Waiver of Liability](#) into one form. That is four pages.

And then I have a two-page Client Intake and Record form. That's all I've got, except if I need to have a Model Release, for filming, then I will have them sign that, if they want to do that. Also, the Physician's Referral form, for working with Physicians who may be referring patients to me.

The forms list.

I have the [Price List, Studio Policy, and Waiver](#), the [Client Intake and Record](#) - that means medical record, [Physicians Referral and Prescription](#) - for insurance billing, and the [Model Release](#) - optional. That's all that I have. It is simple.

The [Studio Policy](#) is for your first session with a new Client, and for existing Clients.

They read everything, and they sign and date it.

1. For your first appointment, please bring your photo ID, fill out the client record, intake form, and medical history in full, sign and date where indicated. Complete information is needed for your safety and benefit. Records are private per HIPAA regulations. Please read the Price List, Studio Policy and Waiver, Client Intake and Record, Model Release (optional). Bring your Physician's Referral and Prescription if this will be for insurance billing, and your insurance information.

It is straightforward. If you are going to go to any doctor's office, you are going to bring your photo ID and your insurance information.

The first person that you are going to encounter there will be the receptionist, the person who is going to take that information. I hope that is a pleasant experience for people, to have their first contact to be a good one. Just to give one example.

2. Please be on time. Everyone's time is important. 24 hours' notice is required to change appointment time, unless you are having an emergency. Missed appointments will be charged at full rate. If you are late for your appointment, we will still have to end the session at the allotted time.

If you need more time during your session, please understand that I will do my best to add more time if the schedule allows, and that you are agreeing to pay me for the extra time. We will discuss it at that time before proceeding.

I am casual about this. Sometimes people just don't plan correctly, and I will let them get by with it at least once, before I enforce that rule. I don't want people to be upset. I would rather just treat them well, always.

Please be on time.

3. Contagious Diseases or Conditions.

This is important.

If you are ill with a contagious disease, your session will not be scheduled until your disease or condition has been resolved. This precaution is necessary to protect everyone from infection.

This includes upper respiratory infections, colds, coughs, flu, fever, and any kind of infectious skin, nail, hair condition, including fungus infections.

I realize that if you are working in a hospital or other clinical environment where you do treat contagious conditions, then I am sure that you have your quarantine procedures in place to prevent the contagious pathogen from being able to infect other people.

That is up to your protocol, but it should be mentioned.

4. Massage Therapy Sessions are designed for your maximum comfort and to get the best therapeutic results.

You will be undressed to the level of your comfort, and professionally draped at all times. We will communicate as needed to follow the best course during each session. It is best to just relax and enjoy the session.

5. Healing Light Kata is an integration of Royal Yoga, Supreme Ultimate Fist, and Posture Alignment.

Massage Therapy is an integration of Swedish, Deep Tissue, Structural Alignment, Zen Shiatsu, Traditional Thai, Chinese, including Acupressure, Tuina, Sports, Medical, Hot Stone, and Ice. Those are the modalities that I employ in my practice.

6. Group Yoga Classes and Workshops.

See Class Schedule. You must schedule your place in class in advance. Payment is due in advance or upon arrival. Sign Form: Price List, Studio Policy and Waiver. Please bring your own yoga mat if you require a yoga mat. We have blankets!

That's pretty much it. I do schedule the Movement Sessions before the Focused Massage Therapy Sessions.

I state in my practice that the Massage Therapy Session is optional. My main objective is to help people to achieve Neutral Posture and to try to get them out of pain. That's what I do.

0:37:44 General Service Policy

I should read this, because it is very simple, straightforward.

General Service Policy: By making an appointment, I agree that I understand that I may receive a yoga and/or massage therapy session for the purpose of maintaining optimal well-being and fitness. Steve J Davis, is a registered yoga teacher and licensed massage therapist. He does not reject clients based on nationality, sex, sexual preference, age, or any other classification. However he does reserve the right to refuse service to anyone. He does not diagnose illness, disease, or other physical or mental disorders. He does not prescribe medical treatments or drugs.

The following statements are for all appointments: Payment of services rendered is due at the time of the appointment, or in advance. Privacy policy for all personal and medical information.

The following statement meets the HIPAA privacy regulation. Steve J Davis will not release any client information to anyone other than the client without written permission from the client.

Please do not eat for at least one hour before your session time. Be sure and drink plenty of pure water before the session.

Have some time to relax after the session. Drink plenty of water for the next two days.

For the Yoga (Kata) Session, please have garments to wear that you can move freely in, either tights, or loose-fitting. If you are going to have your posture photos taken, then your clothes should be form-fitting to see the contours of the body. Please bring your own yoga mat if you need one. We have blankets available at the studio.

That's all it says.

Going back over this, I am going to say one thing.

At any time you feel that you should update your forms - and this includes me - to be more clear about the forms - do it - because people need to know exactly where you stand.

Here is one example.

I reserve the right to refuse service to people.

I do not diagnose any condition.

Let me give you an example of when I may refuse service.

If someone is threatening to me, they may be threatening violence, or they just seem to be unstable, mentally and/or emotionally unstable; I may feel that I am not the best fit for them.

It could be dangerous for me (and others) to have them in my clinical space.

In my opinion, and I have stated this many times in our Private Forum; The best thing to do is to quietly and as gently as possible, say that I don't think I am a good fit for you.

At that point, you can either refer the person out to another Healthcare Professional, or not. It depends on what you think the best course of action is at that time.

I will read something which I send to students. Let me do that now before I continue with this form.

This is my standard answer as part of my specific comments that I make to students taking my Ethics Courses, when I grade their Essay Exam, with regard to the specific question in the Ethics Course that they are taking.

This is the standard reply that I am giving people, and it is reinforcing my principles and values, which I hope that you will understand is applicable to Cultural Competency, and to my Studio Policy principles.

Do No Harm.

Equal Respect for every person and every living being is important, and this is the hallmark of my professional practice and how I live my life, always.

Safety is paramount for all parties at all times.

Communication is vital at all times.

Have a Treatment Plan in writing, and mutual informed consent in writing to that Treatment Plan.

Keep Progress notes in writing.

Keep track of outcomes to that Treatment Plan.

Modify it as needed, with informed consent from the client.

Document everything.

Intentions are very important, and also to be careful at all times.

Have a Safety Plan.

Have a Studio Policy.

Take a thorough Client Intake and Medical Record and require ID from any prospective new client.

Screen any potential new client in advance.

Watch for changes in existing clients.

People can be unpredictable, and some can be dangerous.

Integrity is the root and foundation of Ethics and an honorable life.

All persons and all living beings are equal, and must be treated with full respect and dignity at all times.

Boundaries must be maintained and full respect honored for every living being at all times in every thought, word, and action.

The Treatment Plan is essential, and it must be agreed to by both the Therapist and the Client.

We are here to help each other to succeed. That is my intention.

Safety is absolutely a must at all times. The studio policy and client intake forms must be very clear.

That helps a great deal with expectations and it clarifies intent. The treatment plan should always be done in writing, and updated each time the client comes in for each session.

Charting and documentation are very important.

I appreciate your presence here! It is privileged work, and I am honored to have the opportunity to work with each person.

Ethics is a way of life. It is the path of yoga, my life path, the foundation of this Ethics CE Course, and the foundation of my professional practice. It is my privilege and responsibility to honor Ethics in every thought, word, and action.

My Studio Policy can be summed up in three points.

Do No Harm.

Safety.

Results.

That's it. I will go back to the form.

0:44:33 Reservation Policy

Payment is due at the time of reservation. Please be on time. Everyone's time is important. 24 hours' notice is required to change appointment time, unless you are having an emergency.

Missed appointments will be charged at full rate. If you are late for your appointment, we will still have to end the session at the allotted time.

0:45:01 Cancellation policy

To avoid being charged for missed appointments, I agree to give 24 hour notice of cancellation, barring any emergencies, should I need to cancel or change any future appointments.

0:45:14 Payment Policy

Payment is due at the time of reservation or upon arrival. We accept all major credit and debit cards, cash, and check. For Medical Massage Therapy, I agree to pay in the unlikely event my insurance company declines payment.

And then I have the

0:45:20 Waiver and Release of Liability for Healing Light Yoga and Massage and for me

I hereby release Steve J Davis and Healing Light Yoga and Massage for any liability for any claims now and in the future resulting from my participation in consultations, sessions, classes, and workshops with Steve Davis and Healing Light Yoga and Massage.

There is the signature, date, printed name.

And then it says under the printed name:

Yes, I have read the Healing Light Yoga and Massage Price List, Studio Policy, and Waiver, and I agree to abide by it. Thank you!

That is that form.

We will take a quick look at the Client Intake Form.

0:46:11 Client Intake and Record Form

It says:

Please print clearly and complete the entire form. The information requested is critical to your treatment. For your safety we must be aware of any and all medical conditions for which you have or have not been diagnosed. Thank you, Namaste.

I don't diagnose any condition, as I said.

It has the format that you can look at:

Client Name _____ Date _____
Phone _____

Street Address _____

City, State, Zip _____

Email _____

Birth Date _____ Occupation _____

Emergency Name & Contact Number

And then the

0:46:49 General Questions

1. a. How are you feeling today?

b. How recently have you received a massage? What was it for? Who was the massage therapist? What were the results?

For yoga session, answer accordingly. Also list experience in yoga. Thank you!

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You will have your own forms. I am sure that you already have them.

I am just telling you what I do, to be complete. And it has worked very well for many years.

===

c. What do you want from your massage today? For yoga session, answer accordingly.

d. Do any parts of your body need special attention? Are there any parts that should not be massaged?

===

Always respect people's answers here. If they say - 'don't touch whatever part of their body' - then of course you will not do that. And of course, you are not going to be crossing any boundaries.

0:47:40 Medical History

(use back of form if necessary)

Questions

a. What type of work do you do? Do you have any physical problems that regularly appear in your work, daily life or recreation?

b. Have you ever been diagnosed with cancer? If so, what type and what is your current condition?

c. Do you have any communicable diseases? If so, which ones?

d. What substances are you currently taking (including herbs, homeopathic remedies, supplements, alcohol, recreational drugs and prescribed medications)?

e. Are you currently under the care of a physician? If so, what for? Please write down the physician's name and (if available), telephone number and/or address.

f. Have you had any surgeries? If so, what type and approximate date? Injuries? What happened, what was injured, and when?

===

Generally, we look at any surgery that has happened within 5 years. It depends.

===

g. Do you have problems in any of the following systems? If so, what are they? Do you have any of the listed conditions or symptoms?

(List these specifics below).

SYSTEMS

- _ Cardiovascular
- _ Endocrine
- _ Gastrointestinal
- _ Immune
- _ Musculoskeletal
- _ Neurological
- _ Psychological
- _ Reproductive
- _ Respiratory
- _ Urinary
- _ Integumentary

COMMON CONDITIONS

- _ Allergies
- _ Arthritis
- _ Diabetes
- _ Hypertension
- _ Other

SYMPTOMS

- _ Abnormal energy
- _ Dietary problem
- _ Fever
- _ Headaches
- _ Inflammation
- _ Menstrual

- Any skin condition
- Numbness
- Pain (where?)
- Pregnancy
- Sleep problems
- Stress
- Swelling
- Cold/Fever/Cough
- Fungus infection
- Parasite/other
- Herpes/other
- Other

Stop here until we speak, thanks!

0:49:35 Concluding questions

1. a. To comply with informed consent regulations, I am informing you of the following items. Please initial in the relevant boxes to indicate you understand these items.

(1) ____ What to expect from the entire bodywork session.

(2) ____ The proposed treatment plan, including massage, movement therapy, hydrotherapy, and/or other modalities.

(3) ____ Any contraindications or precautions that will be observed.

===

You will write in the agreed upon Treatment Plan after discussion with the Client, and then you have them initial each one.

===

b. Do you have any other questions or concerns?

===

Always listen to people. Give them plenty of time to talk about any concerns they may have.

It is important for them to be relaxed. You are not in a hurry. Not at all.

In fact, I usually allow 30 minutes for the Client Intake interview. It takes about 30 minutes, even if they have it filled out.

0:50:47 Client Financial Agreement and Authorization for Treatment

By my signature, I certify that the above is true to the best of my knowledge.

By my signature, I state that I understand that I will receive a therapeutic massage and/or private yoga session for the purpose of maintaining optimal health and physical condition. Steve J Davis, is a Registered Yoga Teacher, Licensed Massage Therapist, Board Certified in Therapeutic Massage and Bodywork.

He does not reject clients based on nationality, sex, sexual preference, age, or any other classification. However he does reserve the right to refuse service to anyone. He does not diagnose illness, disease, or other physical or mental disorders.

He does not prescribe medical treatments or drugs.

The following statements are for all appointments:

Payment of services rendered is due at the time of the appointment.

Cancellation policy: To avoid being charged for missed appointments, I agree to give 24 hour notice of cancellation, barring any emergencies, should I need to cancel or change any future appointments.

Privacy policy for all personal and medical information.

The following statement meets the HIPAA privacy regulation.

Steve J Davis will not release any client information to anyone other than the client without written permission from the client.

Client Signature _____

Date _____

Printed Name _____

===

That is a very simple, 2 page Client Intake and Record Form for my professional practice.

0:52:25 Now I would like to go through a few important items.

Screen people in advance. On the phone, or in writing through email (or text message). Make sure that they have the opportunity to study what you do.

I have a very clear explanation of what I do on my [website](#). It is more clear than what I read in the forms. If you look to see what I do under [Clients](#), you will see exactly what it is that I do.

It is very straightforward. How the sessions are going to be organized, and it is clear. What the fees are in advance, so they know.

Sometimes, you may find that the Client is not a proper fit for you. In that case, you have to gently let them know.

I have had many case histories as examples of this.

I have had people show up with infectious conditions. I have had to say 'I cannot treat you because you have what appears to be a contagious condition. I am not a (Medical) Doctor. I would like you to see your Physician and get cleared for Massage Therapy or a Yoga Session before I can see you. I have to have a (Medical) Doctor's clearance.'

Sometimes they get upset, but I have to stay true to my principles.

For example, fungal infections are highly contagious, and if I see that on their feet then I am going to refuse treatment. If they come into the clinical space, the fungal spores can survive up to 18 months, and up to 24 months if attached to a hair shaft and infect other people.

You can breathe the spores into your lungs and they can establish themselves into the lungs. It depends on what type of fungus that it is.

I have made a thorough study of this, and I was also taught about it, by Dr. Frank Parker, M.D., the Chair of the Dermatology Department at OHSU. I have a lot of respect for him. He has taught me about this and other skin conditions. This is something that I take very seriously.

I am not an expert, I do not diagnose, I am not a Dermatologist.

When I see something like that, I have got to be careful, because I have to think about the other people who will be coming into the clinical environment, plus myself. I care about everybody, and that is why that is in force. A contagious condition is a contraindication for treatment until the condition is resolved. Just be clear about that.

If you are clear about everything, then you are not going to get into trouble, and people will respect what you do.

Going back to the three aspects of my Studio Policy:

Do No Harm

Safety

Results

Those three.

Do No Harm. Don't do anything that is going to harm the person, or harm you, (and for everyone in the clinical space).

Safety means always be safe in your procedures, and let people know that you will be safe in your procedures when they come to see you, that you will be looking after their safety, (and for everyone in the clinical space).

Results. That applies to the outcome of the Treatment Plan. And that you can help them in your professional capacity as a Healthcare Provider. You should make the Treatment Plan in writing, and make sure that the Client agrees to it in writing. Always assess the Treatment Plan each time that they come in.

Subjective, Objective, Assessment, and Plan, for S.O.A.P.

You are going to ask them for their **Subjective** feedback. How do you feel? How did the last session work for you?

Objective. Look at what you see. Use the four methods of observation in Zen Shiatsu. Their body movement. Posture, You will be listening to the sound of their voice. And you will also be noticing what they are saying, the questions that they may be asking, and also their responses to questions that you are asking.

And finally, palpation, touch. Touch is a medium of communication where it is a wide band of information.

First one is that you will look at their body movements, how they are moving their body, to get a sense of how they are, how comfortable they are in their own body.

Second, the sound of the voice. How it resonates. You can learn a lot just from that.

I go into this in detail in my other courses. It is important to have these accurate observation methods. I am not diagnosing. I am definitely watching people, and learning from what I am seeing, hearing, and feeling. That is important.

Third, the answer to questions that you ask, or questions that they are asking you. You are making a note of the type of conversation that you are having with them. Finally, Palpation, if you touch them. For a Physician, a Cardiologist, they may be listening to the heart. Taking a pulse rate, using a stethoscope, and noticing the heart.

There are different observations and tests that you might be doing, according to your specialty.

057:51 [Path of Yoga](#). Now, I would like to go through the Path of Yoga.

This is the [8 Limbed Path of Patanjali](#). He was a sage, who may have existed, or maybe not, no one knows for sure - about 2,000 years ago.

I think this knowledge is timeless, evergreen, always relevant, and totally applicable to Cultural Competency.

Regardless of what philosophy, religion, or cultural background you have, I believe that these principles apply to help communication and respect for all persons at all times. It is very simple, and relevant, I think, to our work as Healthcare Providers.

The First Limb has five parts to it. The Second Limb has five parts to it.

The First Limb is called Yamas. That means Restraints.
In other words, don't do these things, because if you do, you will fall off the path of yoga.

First of all, what is yoga? Yoga means Union. Union with All. It is that simple.
Union with Life itself.

I do not think there is a conflict with Healthcare and Wellness when you think about the definition of Yoga. It is straightforward. If you embrace Life, then you will embrace Yoga.

Path of Yoga, 8 Limbs.

First Limb. Restraints. It has five parts. I will read the Sanskrit quickly, and then I will define each one.

[Path of Yoga. 8 Limbs.](#)

1. Yamas

Ahimsa

Satya

Asteya

Brahmacharya

Aparigraha

Ahimsa means non-violence. The first aspect of the first limb of yoga, which means Restraints, is non-violence. Don't be violent to other people, to yourself, or to any living being. Non-violence, first principle of the first limb.

Second, don't lie. Always tell the truth. Satya means truth. Tell the truth in every thought, word and action.

Don't steal. That is the third aspect.
Asteya. If you steal, then you are doing great harm to someone else. And also to yourself. Precious things come to you when you stop stealing. As they say.

Brahmacharya. Don't lust. Non-lusting.
This does not mean to not be in love, or to understand love. Lust is something else.

Each one leads to the next one.

Non-attachment. Aparigraha. If you have these other bad behaviors, it will cause you to become attached to the fruits of those bad behaviors, of those desires.

Violence, lying, stealing, lusting, those lead to attachments.

You are here for a certain job, duty.

Second limb. The first limb and second limb lead into each other.

The second limb is the observances, and we have five of them.

2. Niyamas

Saucha

Santosha

Tapas

Swadhyaya

Ishwara Pranidhana

The first one means cleanliness, in every thought, word, and action, in your body, what you are putting into your body, your environment. You want to be clean. In your thoughts, what you are taking into your body, and no clutter. Keep your environment organized. It will help to free your mind to have the clutter out of the way. **Saucha, Cleanliness.**

That leads to the next one which is **Santosha, Contentment.** Once you have your body, mind, spirit - everything is clean, then you are content.

Then **Tapas, Discipline.** Also **Tapasya, which means duty.** Now you are ready to do your duty, why you have come here.

It is a logical progression. Tapas means discipline. Tapasya is duty.

Be clean in every thought, word, and action, what you are putting into the environment, and then you are ready to do your duty, and to be disciplined about it.

You came here to do a certain job.

Swadhyaya. This is the fourth aspect of the second limb. **Swadhyaya means Self-study.**

How am I doing at being me? How am I doing at my job as a Healthcare Professional? Could I improve?

It is introspective, observing yourself, and not being attached to that.

And then finally, **Ishwara Pranidhana is very important. That means Devotion to God, Devotion to All.** It is said, in the four Padas, the four feet of Yoga, that is what leads to the Supernatural Powers that yogis have. So they say. Those powers come, or they don't. Because the yogi may be tested at this point.

If you can get to this place, where you have done all of these things, and all of the limbs are like rungs on the ladder of yoga - and the limbs are always concurrent and consecutive. You have to maintain them all of the time. You cannot drop them. Drop one and do the other. It is a way of thinking, it is a life, a lifestyle. If you can do these first two limbs, then the path of yoga, the rest of the limbs will be unveiled to you. It is a beautiful path. It is very pure.

3. Asana

The third limb I will go over quickly. It is Asana. That means to be comfortable in your body. It does not mean doing any harm. For example, doing these headstands. Sure, if you do that, it is fine, but you do not want to harm the body. That would be violent, wouldn't it. That would violate the very first principle of the first limb of yoga. Ahimsa, non-violence.

Asana means to be seated comfortably in the body. That means the body must be healthy in order to enable the mind to be able to focus on the present. It is all about being in the present, the domain of Life.

4. Pranayama

Pranayama is the fourth limb. That is breathing. Prana is Life Force, Yama is a pause in Life.

Life and Death, or Life, and a pause in Life. It is the way the breath works, in and out. Inhale, exhale, and pause. When you do this successfully, you will focus your mind. And you will start to understand a lot more.

5. Pratyahara

The fifth limb is Pratyahara. That means to bring the senses inward, typically is how that is translated. I think of it as also outward, because once you open the Door of Awareness, then it is always open. You are not closing yourself off, staring at a candle flame, or in a cave. You are in the world doing your job, your duty, with your responsibilities.

Pratyahara means to Open the Door.

6. Dharana

7. Dhyana

8. Samadhi

Dharana, Dhyana, and Samadhi are linked together, called Samyama, Garland of Limbs.

They have to do with increasing levels of awareness in meditation or mindfulness state.

Dharana means to prepare for meditation. Dhyana means to immerse yourself, and Samadhi means to be totally immersed, and also the length of time. Those are higher states of consciousness or awareness.

All of this is a way of life. It is a beautiful way of life. It is not a religion. It is a pure timeless way of life that I think that has been around throughout eternity, not just from India.

Every culture throughout history I think has found this truth.

Kaivalya

Kaivalya means state of absolute freedom. Once you have achieved this, you are free.

Satyanarayana

Satyanarayana means God State, or Creation State. You may have a glimpse of that.

This is the age-old Path of Yoga. Simple.

Going back to the principles of Cultural Competency, just respect everyone, listen to them.

I want to come back to my **Studio Policy** in three points.

Do No Harm
Safety
Results

Thank you, and Namaste

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[Lesson 1 Selected References](#)