

TABLE OF CONTENTS

| | |
|---|----------|
| PROFESSIONAL REPRESENTATION | 2 |
| STANDARDS OF PRACTICE | 2 |
| TREATMENT AREA SANITIZATION & DISINFECTING | 2 |
| <i>Hand Washing</i> | 2 |
| <i>Preparing the Treatment Area</i> | 3 |
| <i>Prevention of Infectious Disease</i> | 3 |
| <i>Use of Personal Protective Equipment (PPE)</i> | 4 |
| FEES | 4 |
| <i>Informing Clients of Fees</i> | 4 |
| HEALTH HISTORY & INTAKE FORMS..... | 5 |
| <i>Obtaining & Updating Forms</i> | 5 |
| <i>Maintenance & Use of Records</i> | 5 |
| <i>Intake Form Categories</i> | 6 |
| CONSENT | 6 |
| <i>Written Consent</i> | 6 |
| <i>Consent Form Categories</i> | 7 |
| CLIENTS' RIGHTS DURING VISITS | 8 |
| INDICATION FOR TREATMENT | 8 |
| <i>Determining if Manual Osteopathy is Indicated</i> | 8 |
| THE INITIAL APPOINTMENT..... | 9 |
| <i>Assessment or Re-Assessment</i> | 9 |
| <i>Initial Assessment Categories</i> | 9 |
| <i>Treatment Goals Interview</i> | 10 |
| <i>Explaining the Initial Appointment to the Client</i> | 10 |
| CLOTHING DISPLACEMENT & REMOVAL | 10 |
| <i>Displacement of Clothing (within the scope of Manual Osteopathy)</i> | 10 |
| CHANGING POSITIONS DURING TREATMENT: INSTRUCTING & ASSISTING THE CLIENT | 11 |
| DEVELOPING A TREATMENT PLAN | 11 |
| <i>On-Going Treatment Plan</i> | 11 |
| <i>On-Going Treatment Categories</i> | 12 |
| <i>Changes in Treatment Plan</i> | 12 |
| HOME-CARE & EXERCISES | 13 |
| DISCHARGING A CLIENT | 13 |
| PRACTITIONER'S RIGHTS & OBLIGATIONS..... | 13 |
| <i>Practitioner's Rights</i> | 13 |
| <i>Practitioner's Obligations</i> | 14 |
| CLIENT RECORDS..... | 14 |
| <i>Client Health Record</i> | 14 |
| <i>Recording Treatment Notes</i> | 14 |
| <i>Legal Forms</i> | 15 |
| <i>Other Important Forms</i> | 15 |



PROFESSIONAL REPRESENTATION

In Ontario, “Osteopath,” “Osteopathic Physician,” “Doctor of Osteopathy (DO),” etc. are protected terms reserved for use by medical doctors that are trained osteopathic physicians and members of Colleges of Physicians and Surgeons of Ontario (they are usually trained DO’s in the United States). Currently there are no educational institutions within Ontario providing a Doctor of Osteopathy degree, however, there are several institutions providing training in manual osteopathy which is much more common across Canada and the world. Manual Osteopathic Practitioners, Osteopathic Manual Practitioners, Manual Osteopaths, etc. are the terms frequently used by graduates of manual osteopathy programs meeting the World Health Organization's Benchmarks for training in Osteopathy (2010).

This document refers to the latter, Manual Osteopathic Practitioners, Osteopathic Manual Practitioners, Manual Osteopaths, etc., and any mention of osteopathy or practitioners pertains to the manual osteopathy practice specifically.

STANDARDS OF PRACTICE

TREATMENT AREA SANITIZATION & DISINFECTING

HAND WASHING

STANDARDS

- The practitioner must wash their hands for at least 20 seconds with soap and water
- They must also disinfect all surfaces that may come into contact with the client immediately before AND after each treatment

REQUIREMENTS & SAFETY MEASURES

- Soap and water or an alcohol-based hand sanitizer (70%+ alcohol) must be used to clean any skin surfaces
- Disinfectants must be on the approved list of *Hard-surface disinfectant and hand sanitizers*

PREPARING THE TREATMENT AREA

STANDARDS

- All equipment and furniture must be maintained/repared regularly, as needed
- All areas and materials in the treatment area must be clean and thoroughly disinfected
- The treatment area must be cleaned and disinfected before AND after client departures AND entries

REQUIREMENTS & SAFETY MEASURES

- All equipment and furniture must be checked regularly to ensure it is functioning as intended and maintained/repared if it is not found safe
- All equipment and furniture must be assembled, used, and maintained as intended by the manufacturer
- Disinfectants must be on the approved list of *Hard-surface disinfectant and hand sanitizers*
- All linens must be laundered on the highest heat settings
- All pillows must have an appropriate cover and be disinfected or laundered after each use
- Clients must be able to get on and off the table safely
- Prevent accidents by removing any obstacles or substances that could cause injuries

PREVENTION OF INFECTIOUS DISEASE

STANDARDS

- The client must be interviewed if an infectious disease has been identified to determine the risk of outbreak and/or exposure
- The precautions to prevent an outbreak must be taken before, during, and after the treatment

REQUIREMENTS & SAFETY MEASURES

- The practitioner must be aware of the symptoms associated with the infectious disease
- Use of screening tools are mandatory to identify the risk of exposure
- Use of protective barriers are mandatory if the client's risk status is unknown
- The clinic area must be thoroughly disinfected by an approved disinfectant
- The client must be informed of reasons for screenings and precautions
- The client should be able to ask questions
- If the client is not fully aware or unable to comply with appropriate disease prevention measures the practitioner may instruct and educate the client
- The practitioner may provide appropriate supplies for the client and aid them where necessary to wash hands and handle PPE or the practitioner may choose to discontinue the session
- The practitioner may refuse care if the client chooses not to comply with the required health and safety measures laid out by the Ministry of Health of Ontario



USE OF PERSONAL PROTECTIVE EQUIPMENT (PPE)

STANDARDS

- A client or manual osteopathic practitioner with a recognizable contagious condition must use personal protective equipment to prohibit spreading the infection
- If there is an outbreak, the appointment should be rescheduled after they have been symptom-free for at least 14 days (for example, in the case of COVID-19)
- Follow all public health guidance

REQUIREMENTS & SAFETY MEASURES

- All requirements of communicable disease control must be met
- Any affected region of the client or therapist must be avoided or covered so that it cannot come into contact
- In the case of a potential airborne disease, appropriate face coverings must be worn by anyone in the treatment space and/or common areas
- The manual osteopathic practitioner must explain why the use of gloves, other suitable alternative or barrier is necessary or recommended
- The practitioner must identify any potential risk of allergies (i.e., latex, fragrance, etc.)
- The client should be able to ask questions
- If the options above are not suitable, then a modification must be made or the session rescheduled/cancelled

FEEES

INFORMING CLIENTS OF FEES

STANDARDS

- Clients must be informed of the fees for their treatment prior to arrival or at their first appointment
- Cancellation policies can only be enforced with client's informed consent

REQUIREMENTS & SAFETY MEASURES

- Clients must have access to fee schedules and treatment plans
- Clients must be informed of manual osteopathic session rates prior to the beginning of the session
- You must explain your cancellation policy and related fees to your clients
- The client must be notified of all changes to fees and treatment plans prior to occurrence

HEALTH HISTORY & INTAKE FORMS

OBTAINING & UPDATING FORMS

STANDARDS

- The manual osteopathic practitioner must obtain and update the client's health history before the initial treatment
- The practitioner must record and update the client's health history at least every year or after the client is absent for one year or longer

REQUIREMENTS & SAFETY MEASURES

The manual osteopathic practitioner must obtain a health history form from the client with the following information:

- Date health history was initially taken or was updated
- Client name, address, birthdate, contact number, occupation, source of referral, name and address of primary care physician
- Current involvement in treatment with other health care practitioners
- General health status
- Current medications and for what conditions
- Timing and nature of injuries, accidents, and surgical procedures
- Primary complaint
- Reason(s) for seeking treatment and primary complaint
- Any cardiovascular, gastrointestinal, musculoskeletal, respiratory, genitourinary, gynecological, and other conditions
- Presence of any internal pins, wires, devices or artificial joints
- Presence of any infectious diseases

MAINTENANCE & USE OF RECORDS

STANDARDS

- It is the responsibility of the practitioner to educate the client and make them aware of the information needed in order to proceed with the initial or follow-up session and how that information will be protected and used

REQUIREMENTS & SAFETY MEASURES

- The practitioner must be informed if there are any changes to the client's health status
- The client must be made aware of the importance of an accurate health history
- The client must be made aware that all information is confidential and will not be shared or released without their consent
- There must be verbal and written authorization obtained before release of information
- The client should be able to ask questions
- The practitioner must be aware of any allergies or sensitivities related to treatment and additives
- Any contraindications for the manual osteopathic treatment must be recognized

INTAKE FORM CATEGORIES

- Personal information
 - Demographical information
 - Contact information
- Referral information
- Medical information
 - Diagnosed pathologies: a list from each body system, such as cardiovascular, respiratory, infectious, digestive, urogenital, special senses, etc.
 - Symptomology : headaches, visual disturbances, other
 - List of medications and any other supplementation
- Medical history
 - List of past surgeries, surgical implants, traumas, allergies aches/pains and medications
- Client's goals
 - Reason for seeking treatment
 - Areas of complaint
 - General sense of self well being
- Signature
 - Patient signature and present date

CONSENT

WRITTEN CONSENT

STANDARDS

- Written consent must be given freely by the client **before** the initial assessment or reassessment begins
- After the assessment or reassessment, the practitioner must receive the client's signed consent to continue with treatment
- The written consent should be kept in the client's clinical record
- The client must be aware that all information, documents, health history, etc. are completely confidential and cannot be released or shared without written consent

REQUIREMENTS & SAFETY MEASURES

- Written consent must be given freely and not through misconception
- The client must be informed of the treatment approach, scope, and regions of the body to be treated
- The client must be informed of any benefits, risks, possible complications, and contraindications
- The client must be informed that the (re)assessment and/or treatment will be stopped or modified at their request any time during any session
- The practitioner should regularly check to ensure that their client is comfortable
- The client should be able to ask questions

CONSENT FORM CATEGORIES

- Modality description
 - A definition of manual osteopathy and what it can entail (1-2 sentences)
- Consent for physical assessment and treatment
 - The assessment and treatment must be verbally discussed with the client before written consent (signature) is obtained
- Cancellation and business policies
 - Cancellation policies are at the business' discretion
- Scope of practice
 - A brief and accurate description of methodology of treatment
- Specific description or list of what is **NOT** within the scope of practice of manual osteopathy:
 - Performing any intervaginal or anorectal manipulation of reproductive genitalia for any reason
 - Prescribing of any pharmaceuticals, herbal remedies, vitamins, or any other internal substances
 - However, supplements and vitamins can be recommended if the practitioner has appropriate training in that field (i.e., Naturopath, Homeopath, etc.)
 - Performing surgery, or breaking of the skin through injection needles of any kind
 - However, acupuncture, with a valid College of Traditional Chinese Medicine Practitioners and Acupuncturists of Ontario (CTCMPAO) license, may be performed as a separate modality
 - Performing x-rays or acting as a radiologist
 - Performing medical diagnoses
 - A manual osteopath may state an osteopathic hypothesis, but not a medical diagnosis
 - Performing joint manipulation such that it is taken to, and then past, the joint's normal range of motion through the use of High Velocity / Low Amplitude (also called HVLA or a Grade 5 mobilization)
 - Applying a brace or cast to a broken bone
 - Relocating a dislocated joint

CLIENTS' RIGHTS DURING VISITS

- In general, clients need to be verbally informed of their rights before the treatment begins
- **Clients must be informed of their rights during the questioning period AND prior to the initial assessment**
- Clients must be informed of their following rights:
 - To ask questions or inquire about anything relating to them or their treatments at any time
 - To pause or stop the assessment or treatment at any time for any reason
 - To remain fully dressed or covered during assessment and treatment. Sensitive and private areas (such as gluteal cleft, genitals and breasts) are not to be uncovered at any time during the session. General areas (such as back, abdomen and limbs) may be uncovered for the assessment and treatment portions of the session at the request of the practitioner and voluntary consent of the client
 - To form an opinion of the ethical and professional conduct of the practitioner and share it with a 3rd party (witness on consent)
 - To be treated in any position which is most comfortable for them, in the case of limiting ailments or conscientious beliefs
 - To discharge themselves as a client at anytime
 - To require verbal consent before any physical assessment or treatment

INDICATION FOR TREATMENT

DETERMINING IF MANUAL OSTEOPATHY IS INDICATED

STANDARDS

- After the practitioner has reviewed the client's health history and performed an assessment, they must determine if manual osteopathic treatment is indicated

REQUIREMENTS & SAFETY MEASURES

- The practitioner must determine the indication for assessment and treatment before proceeding
- If there is a contraindication to manual osteopathic assessment or treatment, the practitioner must cease and determine the best course of action such as referring the client to another qualified healthcare professional or modifying the assessment/treatment so the client is not put at risk
- Any referrals must be documented

THE INITIAL APPOINTMENT

ASSESSMENT OR RE-ASSESSMENT

STANDARDS

- After discussing the client's treatment goals, health history, consent, and assessment, the practitioner should schedule a regular re-assessments to ensure correct treatment
- The practitioner should formulate an osteopathic hypothesis by using the assessment and treatment notes as well as observation

REQUIREMENTS & SAFETY MEASURES

- The assessment must include a bi-lateral examination of the following:
 - A detailed interview which includes medical, genetic and lifestyle history to the best of the clients knowledge
 - A detailed subjective examination of the client's symptoms and their qualities
 - A detailed and objective physical examination of the client focusing on tissue texture changes, asymmetries, restriction to motion and locating any points of tenderness
- The manual osteopathic practitioner must identify the following:
 - Any physical conditions that can be treated by manual osteopathy
 - Any physical conditions that require treatment modification
 - Any potential cautions or contraindications at ANY stage of the assessment or treatment must be identified and addressed appropriately. The practitioner must stop the assessment or treatment and refer out to an appropriate health care professional for medical examination or diagnostics. This must be recorded in the clients file
- Re-assessments should be used during the treatment and post-treatment time to note changes or improvements to the dysfunctions found associated with the clinical osteopathic conclusion
- All data collected in the assessment or re-assessment must be recorded in the client's file

INITIAL ASSESSMENT CATEGORIES

REQUIREMENTS & SAFETY MEASURES

The following must be included on the intake assessment and treatment forms:

- Statistical information
- Date
- Subjective assessment
- Objective assessment
- Treatment plan
- Short-term and long-term treatment goals
- Focus area, anatomical structures and techniques
- Client's signature for consent to assess and treat
- Signature of practitioner
- The practitioner should sign after each session record

TREATMENT GOALS INTERVIEW

STANDARDS

- The client must be interviewed prior to or during their treatment about their treatment goals

REQUIREMENTS & SAFETY MEASURES

The practitioner's interview questions must include:

- The client's goal for treatment
- Any of the client's activity limitations
- Identification of focus areas
- Identification of contributing factors
- The client must be given the opportunity to discuss their treatment goals and expectations

EXPLAINING THE INITIAL APPOINTMENT TO THE CLIENT

STANDARDS

- Explain the initial treatment plan to the client before beginning the treatment

REQUIREMENTS & SAFETY MEASURES

- In regards to consent, if the client wishes to change their decision, the practitioner must honour their wishes and change the treatment plan accordingly
- The client should be able to ask questions

CLOTHING DISPLACEMENT & REMOVAL

DISPLACEMENT OF CLOTHING (WITHIN THE SCOPE OF MANUAL OSTEOPATHY)

STANDARDS

- **The complete removal of clothing is NOT necessary within the scope of manual osteopathy**
- There are manual osteopathic techniques where the displacement of clothing is recommended (for example, some visceral techniques are most effective when there is direct contact with the abdomen)
- The manual osteopathic practitioner must correctly receive consent verbally or written to treat directly on the skin if the target region is covered by clothing
- Sensitive and private areas (such as gluteals, genitals, breast tissue) are not to be uncovered at any time during the session
- General areas (such as back, abdomen and limbs) may be uncovered for the assessment and treatment portions of the session at the request of the practitioner and voluntary consent of the client
- Any clothing may be kept on at the request of the client for any reason

REQUIREMENTS & SAFETY MEASURES

- **If the client does not feel comfortable displacing or removing clothing, the practitioner MUST adjust the treatment and/or techniques to accommodate them**
- The manual osteopathic practitioner must make all reasonable efforts to ensure privacy and respect for the client are kept while patient is uncovering or displacing articles of clothing (for example, lifting shirt to uncover abdomen rather than removing it completely)
- Garments or sheets must be provided to cover any parts of the body that may be exposed
- A private space and an appropriate amount of time must be given to change garments
- Infants may be treated and uncovered with consent of parent or guardian
- **Only the treatment area may be uncovered** (if necessary)
- The client must give verbal consent to the practitioner **before** any displacement of clothing occurs
- The following private areas **must remain covered at all times**:
 - Gluteal cleft
 - Genital region
 - Breasts on females
- The client must be informed in advance of any body parts and/or area of the body that will be uncovered during the treatment
- Consent must be recorded in the client's records with a signature

CHANGING POSITIONS DURING TREATMENT: INSTRUCTING & ASSISTING THE CLIENT

STANDARDS

- If the manual osteopathic practitioner requires that the client change positions during treatment, they should instruct and/or assist the client to do so

REQUIREMENTS & SAFETY MEASURES

- The client must be informed on why and how to change position
- The clothing/coverings and pillows must be secure for client comfort
- The client must **NEVER** be exposed during the position change
- The manual osteopathic practitioner must ask the client about their comfort level after changing positions
- All efforts must be made to maintain respectful privacy of the client
- The practitioner must ensure that the client does not fall off or injure themselves on the treatment table while changing positions

DEVELOPING A TREATMENT PLAN

ON-GOING TREATMENT PLAN

STANDARDS

- If manual osteopathic treatment is indicated and consent is given freely by the client to continue with a treatment plan, the practitioner must develop and record an on-going treatment plan

REQUIREMENTS & SAFETY MEASURES

The plan must include the following:

- The client's desired treatment outcome
- Treatment focus
- Regions of the body to be treated
- Approximate treatment and (re)assessment schedule and length of each treatment
- Any beneficial home-care of exercises

ON-GOING TREATMENT CATEGORIES

- Statistical information
 - Date, time, price, treatment length, modality, signature of practitioner
- Client feedback
 - Subjective client feedback on results of treatment or home-care
- Reassessment
 - Objective assessment to make comparison to initial assessment
- Treatment goals
 - Specific goals for the present treatment or modifications to the initial treatment plan
- Treatment method
 - Techniques used on which area and anatomical structures

CHANGES IN TREATMENT PLAN

STANDARDS

- If the practitioner needs to change or modify the treatment plan, they must inform the client
- Possible reasons for change include:
 - The client requested changes
 - A change in the physical condition or health status of the client
 - The client did not respond to the current treatment(s)
 - Concerns with client compliancy

REQUIREMENTS & SAFETY MEASURES

- The practitioner must thoroughly explain the changes in the treatment plan to the client
- The client must consent to the changes in the treatment plan
- The client should be able to ask questions
- The practitioner must respond to all of the client's questions
- If the practitioner is not able to answer any questions, they must refer the client to another healthcare practitioner

HOME-CARE & EXERCISES

STANDARDS

- If needed, after the completed manual osteopathic treatment, the practitioner should indicate home-care (before the client leaves)

REQUIREMENTS & SAFETY MEASURES

- The practitioner must explain the recommended home-care
- If needed, the practitioner must watch the client perform any given home-care to ensure that the client understands, uses, and performs them correctly
- The practitioner must explain to the client appropriate home-care, including its expected result and any potential negative responses, however, the home-care cannot put the client at risk and should they experience any severe negative responses, they must suspend the home-care

DISCHARGING A CLIENT

STANDARDS

The manual osteopathic practitioner should discharge the client if:

- The treatment plan is complete and successful
- The goals of the treatment cannot be met using manual osteopathy
- The client is disrespectful or abusive
- The required treatment is outside of the skill or the scope of the manual osteopathic practitioner

REQUIREMENTS & SAFETY MEASURES

- The manual osteopathic practitioner should give the client sufficient notice and reasons of discharge and any referrals should be made at this time
- The practitioner must ask the client if they want their records to be transferred
- The discharge discussion should not occur during the treatment
- The client should be able to ask questions

PRACTITIONER'S RIGHTS & OBLIGATIONS

PRACTITIONER'S RIGHTS

Practitioners have the right:

- To pause or stop the treatment for any misconduct on the part of the client or for any reason which makes the practitioner uncomfortable
- To refuse treatment for any medically complicating factor to which the practitioner is uncomfortable treating for any hygienic or infectious reasons
- To obtain fees for services already rendered

PRACTITIONER'S OBLIGATIONS

Practitioners must comply to the following:

- Practice with good intention and aim for the best possible outcome
- Maintain excellence in professional conduct and practice with good ethics at all times
- Avoid prejudice and any personal biases while in a professional setting
- Become informed and respect all clients' boundaries at all times
- Maintain accurate and up-to-date skills and knowledge of all aspects of the profession through their career as an Osteopathic Manual Practitioner/Manual Osteopathic Practitioner

CLIENT RECORDS

CLIENT HEALTH RECORD

STANDARDS

- The Manual Osteopathic Practitioner must establish and update the client's clinical records within 24 hours of their treatment

REQUIREMENTS & SAFETY MEASURES

Clinical records must include the following:

- The completed medical, family, and lifestyle history and consent form(s)
- Records on initial and follow-up treatments, including the date, time, and length of treatment
- If applicable, records of any authorization to release client information
- Client discharge records
- Records must be kept confidential and be stored in a secured location only accessible to authorized individuals
- If the client was under 18 years of age at the time of their initial treatment, they must complete a new health history and consent form once they are of legal age to do so
- Initial history and consent forms should be updated every year
- All records and client files should be prepared and ready for any action that may require viewing by the client or any 3rd party such as legal personnel, medical personnel, insurance personnel, etc.

RECORDING TREATMENT NOTES

STANDARDS

- After the treatment is complete, the practitioner must record all treatment notes and information

REQUIREMENTS & SAFETY MEASURES

Records must include the following:

- The date, time, length of the treatment, and summaries of the following:
 - All assessment techniques used and their results
 - Areas treated and techniques performed
 - Client's treatment feedback (what helped and what didn't)
 - Any home-care and/or exercises given to the client
 - Any referrals to other healthcare practitioners and/or professionals
- All records must be kept in the client's file
- All files must be kept for a minimum of 10 years in a secured location only accessible to authorized individuals

LEGAL FORMS

- All copies of forms must be used to record events and occurrences
- This is important in many instances, such as:
 - Legal inquiry
 - Insurance inquiry
 - Practitioner recollection
 - Client recollection
- **Practitioners are legally required to maintain accurate documentation of client records and visits**

OTHER IMPORTANT FORMS

Other forms that the practitioner may encounter that must be kept in the client's file, which may include:

- Workplace accident or motor-vehicle accident (MVA) forms
- Insurance forms
- Incident forms (accidents or injuries occurring on clinic premises)
- Consent to release or disclose client information – only necessary when the practitioner needs to share any information with a third party
- Specific intake and assessment forms required for any additional specialty assessment or treatment plan