

Yoga Student Profile

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Introduction

Every time a new yoga student arrives at their first private yoga session, the teacher needs to develop some understanding about who this person is. As yoga teachers and therapists, we have several ways to collect the information we require to get to know our students and their needs – some more direct (via conversation) and others less direct (via observation). We can think of these bits of information we gather as pieces of glass in a kaleidoscope, each of which has value, but they only reveal their true significance when placed in the context of other pieces. Just as a kaleidoscope displays beautiful, multidimensional images when the pieces of glass fall into place, the bits of information we collect and record about our students come together to form a more complete picture of these unique individuals who seek our services.

As we build that multidimensional image, that unique profile for each of our private yoga clients, it's essential to keep detailed notes of our work. Maintaining students' records helps us determine students' challenges and strengths, develop an appropriate plan for our work together, record yoga practices and lifestyle recommendations we suggest for them, and keep track of students' progress. Consistent recordkeeping also helps us form a more complete picture of the student and be more successful at meeting their needs.

Far from a basic clinical record of what our clients tell us and what kinds of poses we do together, keeping up-to-date records of our work with private yoga students helps us gain a deeper understanding of yogic practices, observe different students' responses to these practices, and draw conclusions about chosen techniques' effectiveness and applicability. Taking time to reflect, analyze, and process our work is invaluable in refining our skills as yoga therapists, helping us grow professionally.

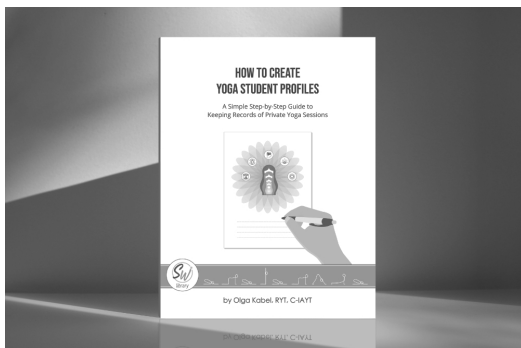
Most health care professionals take regular notes as part of their practice, and as yoga teachers and therapists, we gradually are inching toward wider recognition of yoga's role in health and healing. We also are becoming acknowledged among other health disciplines, as we slowly move toward insurance reimbursement. Our notes eventually will be needed to satisfy insurance requirements and comply with established documentation norms.

This workbook has everything you need to organize your paperwork, simplify your recordkeeping, and chronicle your students' progress. This is a blank template for keeping a complete set of records for one private yoga student. It includes prompts and guidelines on the type of information you need to collect from your student, a place to record all relevant information about your student and your work together, and sample cut-out forms to give to your student. In this workbook, you can document your structural and movement observations; write down your Ayurvedic, energetic, and personality assessments; map out your practice recommendations; list your goals and objectives; and record your individual private sessions' content. This workbook has space for 12 individual sessions, including session notes in the most widely used SOAP format and practice sequences. This workbook also includes a template for a discharge report that you can fill out when you complete your work with the student.

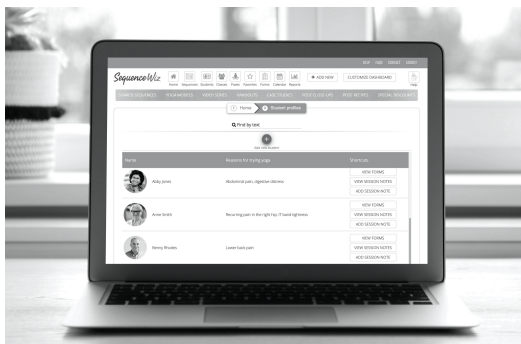
What is usually included in private yoga session records?

- **PERSONAL INFORMATION** includes the client's first and last name, address, phone number, and email address. It is also useful to list their occupation, age, and source of referral.
- **HEALTH HISTORY** includes information about the student's diagnosed conditions, recent treatments, surgeries, and current medications.
- **MAIN CONCERNS** comprise the student's self-described challenges on the physical, physiological, and mental-emotional levels.
- **INTENTIONS** comprise the student's reasons for coming to yoga and their past experience with yoga and meditation.
- **STRUCTURAL OBSERVATIONS** include notes on the student's physical structure in standing, supine (on the back), and prone (on the stomach) positions. Four main elements of the physical structure usually are observed: bones; joints; muscles; and fascia. Each of these elements is assessed from the following perspectives: stability vs. mobility; relationships between different parts; and symmetry.
- **MOVEMENT OBSERVATIONS** include information on the student's movement in and out of yoga poses and holding poses, while noting areas of tension, any obvious asymmetries, and habitual movement patterns. Movement observations usually include notes on connection between breath and movement, breathing pace, the student's understanding of each pose, general body awareness, and the ability to follow instructions and stay focused.
- **AYURVEDIC ASSESSMENT** is an evaluation of the student's constitutional type (vata, pitta, kapha, and their combinations), which reflects their mind-body traits. It identifies specific qualities that appear to be balanced within the student's entire system, the qualities that appear to be out of balance, and the factors that potentially can cause the imbalances.
- **ENERGETIC ASSESSMENT** evaluates the flow of prana (life force energy) throughout the system. The Pancha Vayu model can be used to assess the movement of nourishment throughout the system. It is used to evaluate the student's current physiological state and identify the locations where energy flow is impeded.

- **PERSONALITY ASSESSMENT** evaluates the states of excess and deficiency within each of the body's main energetic centers, i.e., the chakras. It is used to understand how the student's experiences, cultural conditioning, habits, and past physical and emotional injuries influence their deeply held beliefs about themselves and their place in the world, as well as their functioning in daily life.
- **GOALS** comprise an outline of functional, measurable, observable, and action-oriented aims. Goals must be realistic for the student, appropriate for their lifestyle and activity level, and able to be achieved in a reasonable amount of time.
- **SESSION NOTES** usually are written in SOAP format and include information on the student's subjective reporting about their state (S), the teacher's objective reporting on every activity the student completed during the session (O), the teacher's assessment of the student's response to various yogic practices (A), and recommended intervention strategies and plans for the future (P). It can be useful to make notes in terms of the goals that have been set for the client.
- **DISCHARGE REPORT** usually is written upon treatment termination. It provides a synopsis of the client's progress from the start of care to the present time, an overview of treatment received, and recommendations for further care.



Do you need help jump-starting your record-keeping process or refining it? Check out our companion book, *How to Create Yoga Student Profiles: A Simple Step-by-Step Guide to Keeping Records of Private Yoga Sessions*. The guide gives you suggestions and tips for each type of record listed above. It outlines a yoga therapist's scope of practice, explains the best record-keeping practices, offers prompts on how to plan your sessions, and shows you what to include in your session notes.



Do you prefer to keep electronic records? You can use the SequenceWiz Student Management System for Yoga Teachers and Yoga Therapists online (sequencewiz.com), which includes the same components and enables you to modify your forms, duplicate your notes, design your yoga sequences, and more easily exchange information with your students.

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Student Profile

PERSONAL INFORMATION

First Name	<input type="text"/>	Last name	<input type="text"/>
Phone	<input type="text"/>	E-mail	<input type="text"/>
Address	<input type="text"/>		
Occupation	<input type="text"/>	Date of birth	<input type="text"/>
Date	<input type="text"/>	Referred by	<input type="text"/>

INTENTIONS

What are the student's reasons for coming to yoga?

Does the student have any experience with yoga or meditation? If so, describe it.

What kind of challenges is the student dealing with right now?

HEALTH HISTORY

Has the student ever been diagnosed with any of the following conditions?

- | | |
|--|--|
| <input type="checkbox"/> Osteoarthritis/rheumatoid arthritis | <input type="checkbox"/> Breathing problems (asthma, COPD) |
| <input type="checkbox"/> Osteoporosis | <input type="checkbox"/> Digestive issues |
| <input type="checkbox"/> Spinal fracture | <input type="checkbox"/> Reproductive system issues |
| <input type="checkbox"/> Herniated/ruptured disc | <input type="checkbox"/> Cancer |
| <input type="checkbox"/> Spinal fusion or discectomy | <input type="checkbox"/> Diabetes |
| <input type="checkbox"/> Scoliosis | <input type="checkbox"/> Epilepsy |
| <input type="checkbox"/> Bone fractures (lasting two years) | <input type="checkbox"/> Headaches |
| <input type="checkbox"/> Low bone density | <input type="checkbox"/> Immune conditions |
| <input type="checkbox"/> Heart conditions | <input type="checkbox"/> Fibromyalgia |
| <input type="checkbox"/> High or low blood pressure | <input type="checkbox"/> Chronic fatigue syndrome |
| <input type="checkbox"/> Circulation problems | <input type="checkbox"/> Mental health challenges |

Provide more details about checked areas above

Has the student had any treatments or surgeries in the past five years?

DATE

List the student's current medications:

MAIN CONCERNS

Physical concerns

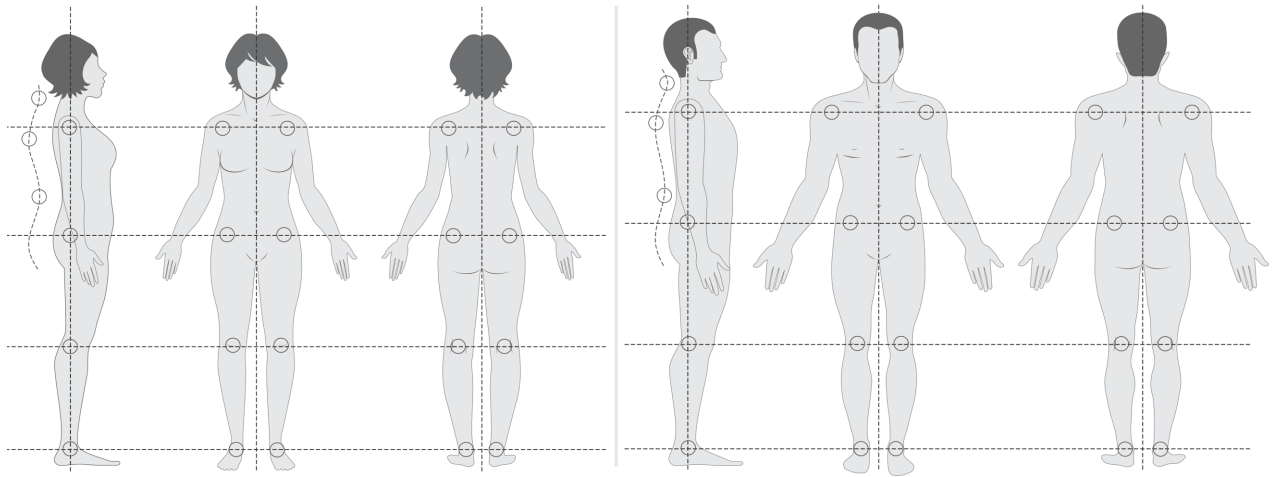
Physiological concerns

Mental-emotional concerns

Lifestyle

Other

STRUCTURAL OBSERVATIONS



Cervical spine

Thoracic spine

Lumbar spine

Neck

Upper back

Shoulders

Arms/wrists

Lower back

Pelvis

Hips

Knees

Feet/ankles

Additional observations
