

How to Create Yoga Student Profiles

A Simple Step-by-Step Guide
to Keeping Records of
Private Yoga Sessions

by Olga Kabel, RYT, C-IAYT

SequenceWiz

Introduction



Hi! My name is Olga Kabel, and I am a yoga teacher and yoga therapist. I've been working with students individually, teaching therapeutic yoga series, and training yoga teachers for the past twenty years.

Working with students one on one has always been my passion. I love every aspect of private yoga work—getting to know a new client; trying to figure out who they are and what kind of yoga practices would serve them best; empowering them to manage their condition and symptoms with yogic tools; and everything else that takes place when you are working with someone face to face. I haven't always enjoyed the work that happens behind the scenes, specifically the paperwork, which includes goal setting, session planning, and keeping records of private yoga sessions. Unfortunately, keeping haphazard records in the past made it easy for me to stray off course in my work with students and made me feel flustered and disorganized. I was always wondering, am I forgetting some important detail? What did the client say about their condition previously? What exactly did we do in the last session?

Then one day I remembered a childhood experience that made me see recordkeeping in a whole new light. When I was little, I liked to play doctor. I would examine my dolls and write down their symptoms on mailing labels that I had snatched from the post office. Those mailing labels worked really well. They had boxes for the patient's name and address, and you could pretend that one box was for diagnosis and another was for symptoms. I kept those "patient cards" along with little "patient history" notebooks assigned to each doll. When a patient came in for a visit, I would dutifully record their symptoms and recovery progress in their notebooks. Most of my dolls had colds at the time, as this is what I had experience with, and on one exciting occasion a doll came down with appendicitis since it was suspected in me at one point. I loved my "medical practice" and kept it up for a long time.

As an adult, I remembered how thrilling it was to have every doll's health history vividly documented and my notebooks neatly organized, how important and professional I had felt. What was it that made the process so enjoyable then? I wondered. And then I realized that I got the most thrill out of filling out those little boxes on the mailing forms that served as my dolls' "patient cards." It dawned on me that it was much easier to fill out a preset template when you know exactly what information goes where rather than staring at the blank page in a notebook and not knowing where to start.

Inspired by that new knowledge and eager to recreate that feeling of order and self-confidence, I started creating my own templates for my students' records. I made templates for the intake form, student profile form, session planning form, and many others. Over the years, I kept refining those templates based on my needs and evolving standards of the yoga therapy field. The templates that I have created over the past twenty years serve as the foundation of this book.

I made a conscious effort to take regular notes using the templates I made to keep track of my students' health challenges, their goals, and yoga practices they responded to favorably. As I began seeing more and more students, those records became easier to write and maintain. They were invaluable in reminding me about small details I might have forgotten and providing a road map of my students' progress.

During that time, I also discovered another amazing benefit of recordkeeping—it was helping me become a better yoga teacher, and later, a better yoga therapist. Moving from a novice to an experienced practitioner in any field is a gradual process. When we take yoga teacher or therapist training and attend continuing education courses, we gain theoretical knowledge of the yogic tools and techniques but little practical experience. As we begin to work with students one on one, we gradually gain valuable experience of real-life application of the theoretical principles we've learned in our trainings. For any practical experience to become integrated in our body of knowledge, we need to process it by reflecting on and analyzing it. When we sit down to write (or type) our notes about our session with a student, we have an opportunity to reflect on what occurred during the session and process our experience of it. 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 the effectiveness and applicability of the chosen techniques. Taking time to reflect, analyze, and process our work is invaluable for refining our skills as yoga therapists, helping us grow professionally.

Recordkeeping can also become a potent tool of self-exploration. Most of our work in yoga therapy is about empowering our students to believe in themselves and their capacity to change their physical, physiological, and mental-emotional state for the better. This is why we always focus on our students and their journey instead of on ourselves. Sri Krishnamacharya used to say, "A teacher should wear neutral clothing," meaning that a good yoga teacher or therapist plays a supportive role and makes every session about the student and their needs. It also means that yoga teachers/therapists need to empty themselves of their own judgments, preconceived notions, and personal drama to be able to show up for their clients, hold space for them, and guide them on their journey. The desired mindset of a yoga therapist can be defined as *sat chit ananda*, where *sat* means "true, real, present," *chit* means "pure awareness," and *ananda* means "unconditional joy."

Since we are all human, staying present, aware, and joyful consistently with our students requires ongoing work. This is where our personal yoga practice comes into play—doing our own yoga with the purpose of self-exploration helps maintain presence, vitality, an open mind, and confidence in our skills. In addition to personal practice, keeping records of our private yoga sessions gives us an opportunity to notice our own reactions and responses to interactions with our students. Did we get defensive about something the student said? Did we feel the need to justify ourselves? Did we talk at length about some yogic idea with the purpose of educating the student, or were we trying to make ourselves look good and sound knowledgeable? The dynamics of a therapeutic relationship dramatically impact the students' perception of yoga therapy, of themselves, and of

the healing process. Whenever we make notes about what took place during a session, it's useful to ask ourselves a few questions: Am I satisfied with how I've handled it? Was this useful to the student? What did this bring up for me? It is not necessary to record what you discover in your session notes, but it can certainly become food for thought and an object of exploration in your personal practice.

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

The International Association of Yoga Therapists (IAYT), the body that serves as a professional organization for yoga teachers and yoga therapists worldwide, requires that yoga therapists keep accurate client records (as stated in the *IAYT Code of Ethics and Professional Responsibilities*). Yoga therapists are also required to maintain the confidentiality of client information, including health records, and store them securely. Currently, no definitive standards exist for storing and maintaining students' records in yoga therapy, so each yoga therapist decides whether to keep records in an electronic or paper form and how to structure their records.

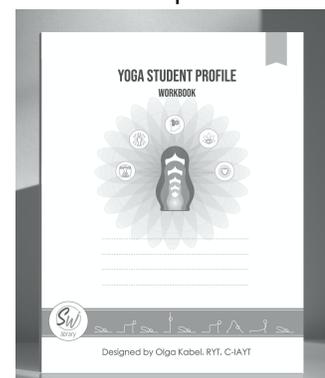
Most yoga therapists haven't had extensive training on how to keep students' records, and in the beginning it might seem daunting. The most important thing when you are just starting out is to do something. My teacher Gary Kraftsow often says, "Doing nothing changes nothing, doing something changes everything."

This book can help you jump-start your recordkeeping process or streamline and refine it. It provides step-by-step guidelines, instruction, and tips on how to keep comprehensive records of private yoga sessions. 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. The book also contains numerous examples of various notes and assessments, relevant yoga references that might be useful in your work with your clients, and sample cut-out forms that you can give to your students.

You can follow the structure outlined in the book to write your notes or use it as inspiration to chart your own course and figure out what works best for you.

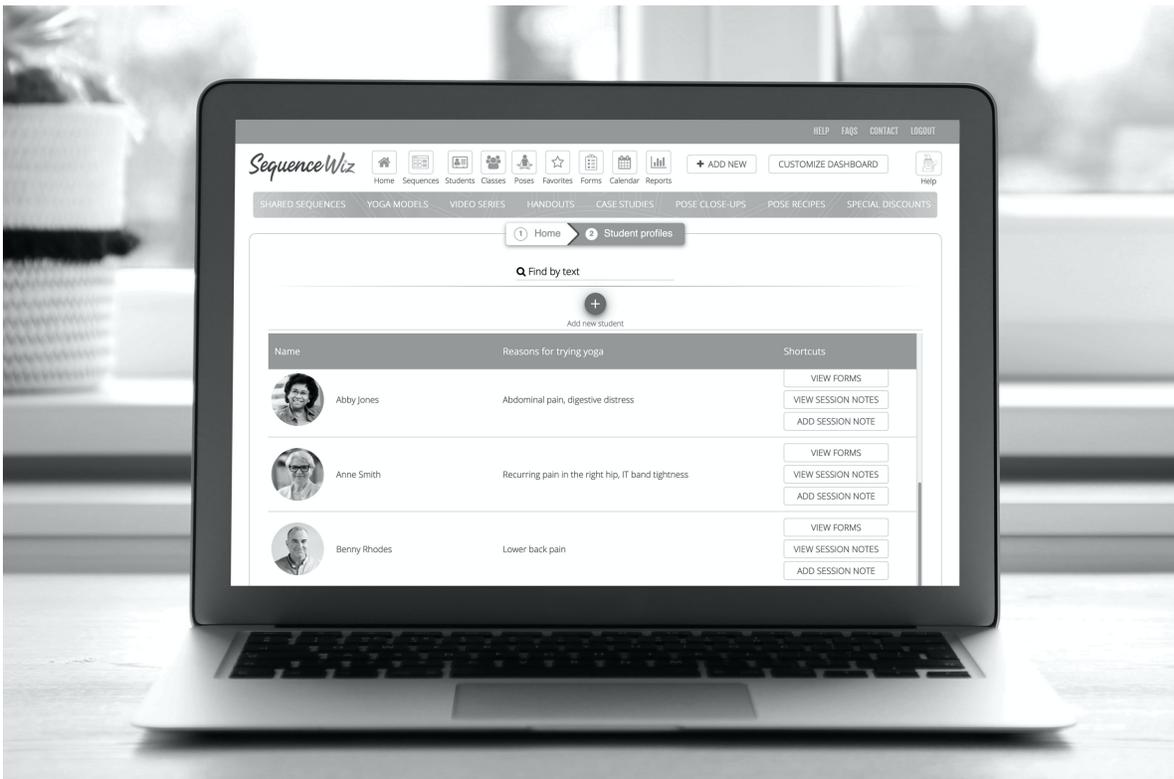
Do you like jotting down a few main points in your notebook following a private session? You can use the simple suggestions in this book to refine the content and structure of your notes.

Do you find it easier to follow a template and fill out boxes with prompts, like I did? You can get the *Yoga Student Profile: Workbook*, which accompanies this step-by-step guide. The workbook has



everything you need to organize your paperwork, simplify your recordkeeping, and chronicle your students' progress. It 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.

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



Do you prefer to keep all your notes as files on your computer? Use the suggestions in this book to make decisions about which records you need and make simple templates for future use. Be sure to keep all your forms and files organized and easily accessible.

Would you rather narrate your notes? You can use the suggestions in this book to choose the type of information you need to record. Make sure that you have a safe place to store all your audio files.

Whether you are a yoga teacher who works with students one on one, a recent graduate of a yoga therapist training, or an experienced yoga therapist, you can use the system outlined in this book to give structure to your recordkeeping, refine your thinking, and organize your practice.

Why keep records of your private yoga sessions?

The documentation you create and receive in the course of your work with your yoga students provides a written history of your students' past and present health. It's used to:

- Determine your students' challenges and strengths
- Keep track of your students' diagnoses, medications, surgeries, and treatments
- Understand your students' functioning patterns within each of the five main layers of their systems and across multiple layers
- Develop an appropriate care plan
- Set goals
- Record types of interventions
- Record students' response to different types of interventions
- Evaluate progress
- Keep track of homework assignments and lifestyle recommendations

Traditionally, health records are also used for a wide variety of purposes. As yoga therapy gains more respect and recognition in the healthcare field, some of the following uses might become relevant to yoga therapists as well:

- Client care management, as a collaboration tool to facilitate continuity of care with other health practitioners
- Reimbursement, to allow for the billing of insurance companies for yoga therapy services
- Legal reasons, to fulfill legal documentation requirements if your records get subpoenaed or you are summoned to testify in court
- Research, to investigate the effectiveness of certain interventions
- Education, to serve as a teaching tool
- The client, who by law has access to the information in their health record and might exercise their right to read it

Ultimately, you cannot remember every detail that each student reports to you and every technique you try out with the student. It helps to keep written notes describing where the student is coming from and where they would like to go. It is also useful to record a brief account of each yoga session to ensure that you stay on track and continue to move toward fulfilling the student's goals.

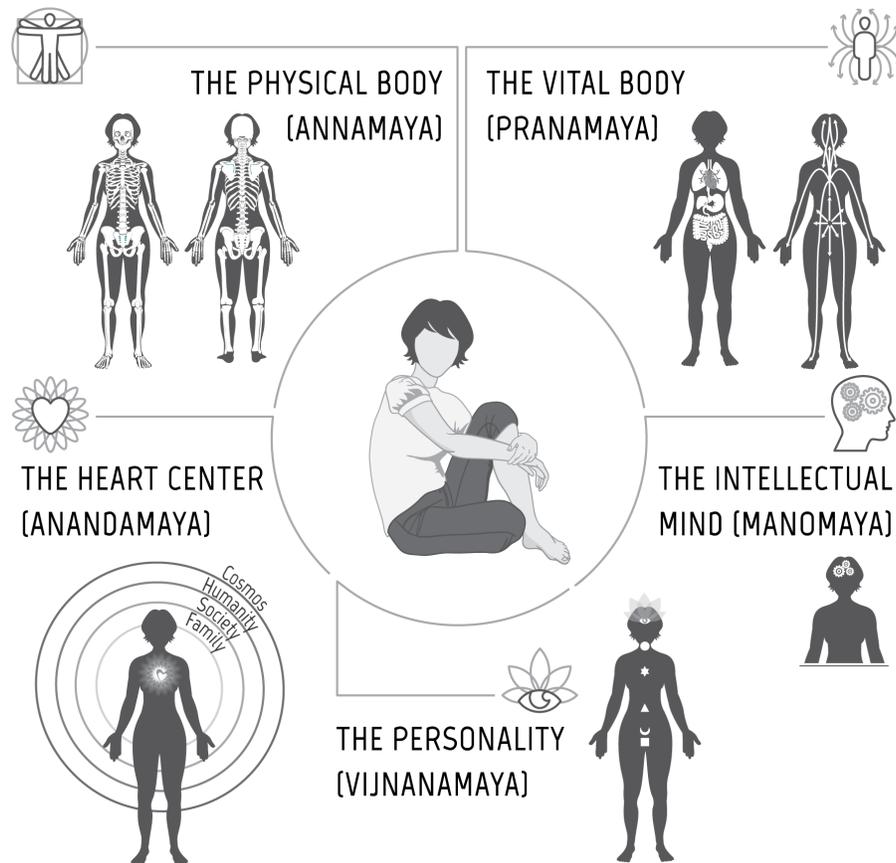
In the healthcare field, no activity is ever considered a service that has been provided until the clinical entry is made in the record. In terms of legal and fiscal accountability, "If it's not written, it did not happen."

Contents

The Panchamaya (Five Koshas) model	10
Teaching yoga to the whole person	11
Client observation and evaluation	14
What is usually included in private yoga session records?	16
Personal information, health history, main concerns, and intentions	18
The art of observation: Reading the student's body story	21
Stages of structural observations	23
Example of structural observations	25
Movement observations	26
Example of movement observations	30
Western and Eastern approaches to health and well-being	31
The Ayurvedic model	33
How to conduct a basic Ayurvedic assessment	38
Example of an Ayurvedic assessment	39
The Pancha Vayu model	40
How to conduct a basic energetic assessment	43
Yoga practice recommendations for specific vayus	44
Example of an energetic assessment	45
The Chakra model	46
How to conduct a basic personality assessment	47
Yoga practice recommendations for specific chakras	48
Example of a personality assessment	49
Long-term goals	50
Objectives for long-term goals	52
Under-the-surface needs	55
Session records	56
Example of a SOAP note	58
Practice sequence (Teacher's version)	60

Practice sequence (Student's version)	61
Student discharge report	62
Paper vs. electronic records	63
How to make recordkeeping easier and more fun for yourself	65
Privacy and security (HIPAA requirements)	67
Sample student profile	
Personal information/intentions	70
Health history	71
Main concerns	72
Structural observations	73
Movement observations	74
Ayurvedic assessment	76
Goals and objectives	77
SOAP note	78
Practice sequence	80
Discharge report	82
References	85
Cut-out forms	
General assessment form	87
Pain assessment form	93
Sleep assessment form	97

The Panchamaya (Five Koshas) Model



The five koshas are described in the *Taittiriya Upanishad* in the following way:

*“Human beings consist of a **material body** (built) from the food they eat. Those who care for this body are nourished by the universe itself” (Annamaya).*

*“Inside, there is another **body made of life energy**. It fills the physical body and takes its shape. Those who treat this vital force as divine experience excellent health and longevity because this energy is the source of physical life” (Pranamaya).*

*“Within the vital force is yet another **body**, this one **made of thought energy**. Those who understand and control the mental body are no longer afflicted by fear” (Manomaya).*

*“Deeper still lies another **body comprised of intellect**. Those who establish their awareness here free themselves from unhealthy thoughts and actions and develop the self-control necessary to achieve their goals” (Vijnanamaya).*

*“Hidden inside is yet a subtler **body, composed of pure joy**. It is experienced as happiness, delight and bliss” (Anandamaya).*

Teaching yoga to the whole person

The International Association of Yoga Therapists (IAYT), an organization that has done extensive work on developing and defining the field of yoga therapy, describes the yoga therapist's scope of practice as follows:

"The yoga tradition views each human being as a multidimensional system that includes numerous aspects—including body, breath, and mind (intellect and emotions)—and their mutual interaction. Yoga therapy is founded on the basic principle that intelligent practice can positively influence the direction of change within these human dimensions, which are distinct from an individual's unchanging nature or spirit. The goals of yoga therapy include eliminating, reducing, and/or managing symptoms that cause suffering; improving function; helping to prevent the occurrence or recurrence of underlying causes of illness; and moving toward improved health and well-being" (1).

When yoga therapists assess their students and chart the course for their work together, they must take into account all aspects of each student's mind, body, and spirit as well as the student's family situation, work environment, socioeconomic status, and cultural context. They must also consider each student's habits, routines, values, beliefs, and rituals.

Over the centuries, the yoga tradition has accumulated a vast body of knowledge on ways to relieve human suffering and promote better health and well-being. **The Panchamaya model** (or Five Koshas model), described in *The Taittiriya Upanishad*, is a way to organize our thinking when it comes to the five main layers of our systems: physical structure; physiological processes; the content of our minds; ideas and attitudes toward our surroundings; and our sense of connection to other people, society, culture, and the Universe. The yoga tradition has developed a variety of methods to bring balance and healing to each of these layers with a specific set of tools.

In their work with students, yoga therapists can choose from a variety of yogic tools that address different layers of the student's system. The IAYT stipulates that a yoga therapist is qualified to "include yoga practices such as asana (postures), pranayama (breath work), relaxation, meditation, mudra (energetic gestures and seals), bandha (energy locks), mantra (sacred sounds), mindfulness, bhavana (imagery), sankalpa (affirmation/intention), yogic lifestyle, and dietary advice according to the yoga therapy framework, education in yoga philosophy, and other practices in the yoga tradition and for which the therapist has received appropriate education and training" (1). The selection of yogic tools needs to be appropriate to the layer of the student's system that needs healing.

PANCHAMAYA MODEL (FIVE KOSHAS)



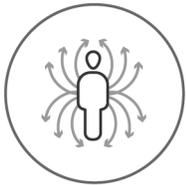
ANNAMAYA (THE PHYSICAL BODY)

All aspects of the physical body must be nourished, taking into account individual needs and limitations. The body is always changing, and four main instinctive drives shape the direction of that change: the urges for food, sleep, sex, and self-preservation. The impact of these urges and our attitudes toward them need to be considered when we work on the physical body layer.

According to the ancients, physical health manifests in:

- No aches and pains
- A feeling of lightness in the body
- Ability to withstand change
- Ability to manage our main urges
- Sense of stability and ease

MAIN TOOL: ASANA (yoga postures coordinated with breath and done mindfully)



PRANAMAYA (THE VITAL BODY)

Prana is the energetic force that animates both body and mind. As humans, we replenish our prana through food, air, and experiences. The physiological functioning of the body is affected by the flow of prana along its five major currents: prana, apana, vyana, samana, and udana. Breath is a vehicle for prana.

Balanced prana flow is reflected in:

- Organ function
- Sleep patterns
- Stress management
- Energy and vitality

MAIN TOOLS: BREATH TRAINING (understanding the mechanisms of breathing and learning to direct and control them); PRANAYAMA (regulation and expansion of prana); MUDRAS (symbolic gestures that are meant to facilitate specific psycho-energetic states); and BANDHAS (energetic “locks” done to affect the body’s subtle energy).



MANOMAYA (THE INTELLECTUAL/CONSCIOUS MIND)

The conscious mind receives sensory impressions from the external world. Through the mind’s activity, we can plan our actions, manipulate the world around us, make mental associations, recall memories, make decisions, and foresee the consequences of our choices. Much of the human experience takes place on the level of the conscious mind.

The mind has tremendous power to influence the entire bodily system. It needs to be educated and developed to be able to:

- Direct and maintain attention
- Make educated choices
- Acquire knowledge (learning)
- Retain information (memory)

MAIN TOOLS: CHANTING (memorizing and repeating specific chants, mantras, or lines from sacred texts) and TEXT STUDY (studying sacred texts to gain perspective).

PANCHAMAYA MODEL (FIVE KOSHAS)



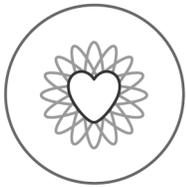
VIJNANAMAYA (THE PERSONALITY)

The personality dimension reflects our present attitudes, perceptions, motives, basic beliefs, and behavior. It's affected by our experience and conditioning. There are four levels of conditioning that shape our personality: genetic programming, personal biography, the society in which we are raised, and our own inherent tendencies. We have great potential to recognize, transform, evolve, and refine our personalities.

The Chakra model can be used as a road map to help us become more:

- Spiritual
- Intuitive, wise
- Expressive, truthful
- Loving, connected
- Powerful, decisive
- Vital, creative
- Stable, secure

MAIN TOOLS: MEDITATION (the ability to sustain a one-pointed focus for extended periods of time) and SVADHYAYA (reflective self-awareness that enables us to become conscious of our conditioning).



ANANDAMAYA (THE HEART CENTER)

The dimension of the heart is the deepest and the most profound. This layer of joy and inner bliss is meant to illuminate our physical bodies, our energy and physiology, and our thoughts and behavior. Through the heart, we can relate to others and find fulfillment. Ultimately, it can become a source of unconditional happiness by connecting to something greater than ourselves.

Anandamaya reflects how we relate to:

- Self
- Family
- Community
- Society
- Humanity
- Cosmos
- The Source (from which we came)

MAIN TOOLS: RITUAL (any action that you infuse with meaning) and PRAYER (invocation of an object of worship meant to establish a connection with something greater than oneself).

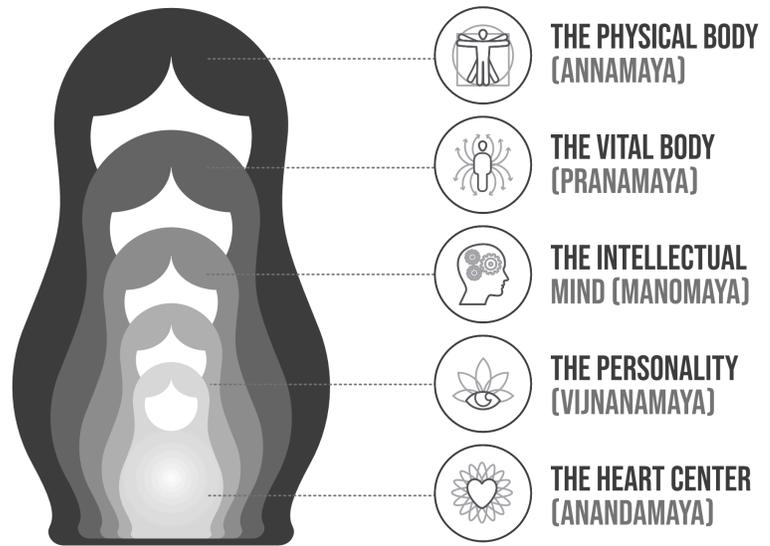
ATMAN (THE CORE OF ONE'S BEING)

The yoga tradition unequivocally states that each of us has an inner essence, an unchanging and compassionate Self that lies beyond the reach of thought and words. It's always present, but it can become obscured by our incessant mental activity and conditioning. The essential yogic text *Patanjali's Yoga Sutras* defines *yoga* as the cessation of mental chatter (Sutra 1.2). Once that mental chatter subsides, Sutra 1.3 continues, you can see your Self in its essence. In our yoga practice, we attempt to help our students settle their mental chatter, encourage them to get in touch with their Self, and give them support and relevant knowledge to attend to their needs. In practical terms, getting in touch with one's Self manifests as becoming reflectively self-conscious about our experiences, actions, and choices, having moments of peace and clarity about our situation, experiencing compassion toward ourselves and others, and having confidence in a positive outcome from our actions, including our yoga practice.

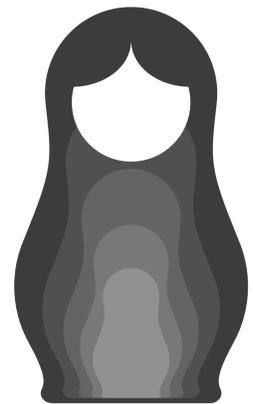
Client observation and evaluation

Humans are multidimensional beings, so when problems arise, they usually show up on multiple levels. The five layers of the human system (or five koshas) are sometimes illustrated like nesting dolls, one fitting neatly inside the other.

The physical body is the most obvious external dimension. Hiding just inside it lies the layer of energy and physiology, then the layer of intellect, then personality, with the layer of joy at the deepest level. Of course, this is a rather simplified view of our multidimensional selves, as these layers are not separate from each other. But this representation illustrates one important point about the Panchamaya model: *The external layers can obscure what's happening on the inside.*

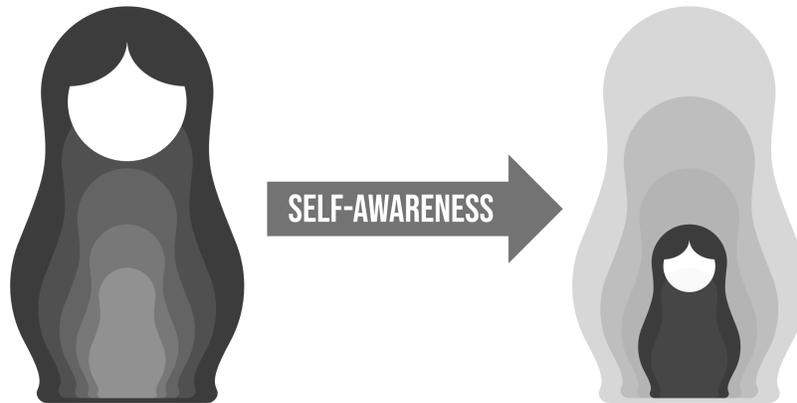


When our students experience physical symptoms of discomfort, it's tempting to try to figure out the cause on the physical body level, but the roots of such discomfort often lie in deeper layers. For example, if someone has ongoing stomach issues, it might be related to drinking too much coffee, or it might be connected to the low-grade anxiety that they are experiencing, which might be associated with a recent fall, reminding them of their mother and how fragile she became as she aged, etc. In other words, whatever is happening on the physical body level might have roots in the deeper layers of the system. Unless we examine these deeper layers, we are bound to tinker with symptoms rather than address the problem's source.



We won't know what the source of the student's chronic issue is until we dig deeper and gradually peel off the layers by encouraging our students to develop and continuously refine their self-awareness. The development of self-awareness can begin by sensing the body positioning in different yoga postures (*proprioception*), noticing how different movements and techniques affect our tissues and inner processes (*interoception*), and becoming aware of our assessments of the inner and outer environments (*neuroception*). Ultimately, self-awareness enables our students to face their deep thought and behavioral patterns that impact their physical bodies, energy levels and physiological functioning, interactions and relationships, and happiness.

Through self-awareness, our students can gain access to deeper dimensions of their systems (which are usually obscured by turbulences happening on the surface) and AFFECT THE DIRECTION OF CHANGE that their bodies and lives go through.



This is why yoga teachers and therapists need to ask questions and use their observational skills to gain a better understanding of who the student is on each layer of their system, which obstacles interfere with their recovery, and how to guide them toward healing. This is why it makes sense to organize our Intake forms (and many other forms) according to the structure of the Panchamaya model.

As yoga teachers and therapists, we have several distinctive ways to collect the information we require to get to know 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 individuals who seek our services.

When you begin to work with a new student, it might be difficult to tell which information is relevant to their challenges and is worth exploring and recording. After all, the Panchamaya model reflects the entirety of the human experience. To make it easier, we usually start with collecting information about the most obvious aspects of their life and experience. This includes personal information about age and occupation, health history, and the types of challenges they are currently experiencing. We also need to find out what brought them to yoga and what they would like to get out of their yoga experience in practical, tangible terms. Then we move on to observing their body, complexion, demeanor, and attitudes, both in stillness and in motion. All this information helps us get a better sense of who that person is on different layers of their system. It usually helps to have a template for a more systematic approach and record the basic information we need to proceed safely and effectively.

What is usually included in private yoga session records?

- **PERSONAL INFORMATION** includes the student'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 about 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 the 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 could potentially 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** are usually 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.