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KTS 004
June 30, 2024 Intake

X Assessment & Plan of Care	Treatment intervention
☐ Case Notes	Yoga Therapy progress notes

These forms are in addition to the Intake Packet Checklist.

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Assessment
 KTS 004
 24.07.27



CLIENT ID:

SUBJECTIVE

Age: 47	Disability: I/DD PD MH N/A	Race: Asian
Marital status: M D Se Si	Gender: M & F	Pronouns:
Diagnoses	Menopause; uterine cancer (post-treatment)	
Medication	N/A or Y:	
Living situation	Alone Family	Friends Pets: C D
Socially active	Often Sometimes	Seldom Never
Employment status	FT Students and unemployed N/A	Retired 2nd/3rd career
Reason for Therapy	Pain Adjunct Therapy Mental Health Focus	Self-care Stress Management Physical Health Stamina
Access to Healthcare	Insured	Uninsured
Client's Goals		

OBJECTIVE: Over six 90-minute Yoga Therapy sessions to improve stamina, balance, emotional balance, and reduce stiffness.

Therapist notes:

Physical observations (define)	Posture Shoulders forward, upper back hunched	Stiffness Yes, in back, hips, knees	Chronic illness	Flexibility Impaired
Mental Health	Upbeat	Reserved	Depressed	Other
Range of Motion	Very good	Good	Fair	Poor
Physical Activity	Often	Sometimes	Seldom	Never
Muscle performance	Strength	Power	Endurance	Impairment
Breathing	Deep	Shallow	Reverse	Winded

Client is a 47-year-old Asian female living in the USA for three years. She speaks fluent Cantonese and English. She wishes to increase her stamina, lose weight, and balance her emotions. She wants to move more and practice mindfulness, be more aware and connected.

She has no experience in practicing yoga and thus has no routine. She thinks she will prefer gentle and chair yoga. She does meditate but “not often”.

KTS lives in a nonviolent way, mostly truthful, prefers living with purity by eating clean health foods, living and keeping a clean home. She is introspective, quiet, avoids too much stimulation, and aspires to a life of concentrated awareness. She’s familiar with guided imagery and relaxation, body scans, tense and release which she learned through the cancer program at the hospital.

She wishes to experience a connection to the greater whole, to feel complete.

She has a PCP and sees a few specialists as well. She struggles with allergies, menopause, and has weight concerns. On July 7, 2022, she had a hysterectomy due to uterine cancer. She is up to date on her physical, dental, and vision exams. She takes a few supplements but didn’t list any prescribed medication.

KTS notes that she can’t kneel for long, has lower back and ankle pain and is prone to strains, and her balance is poor. She awakens between 6 and 7am, uses an alarm; and is in bed between 10:30-11pm. She falls asleep easily and isn’t tired when she awakens.

At work, the Client sits approximately 6 hours per day. She has work-related restlessness, and doesn’t enjoy long periods of sitting. She has every possible cushion, wedge, etc. for her chair, computer and floor in an attempt to sit comfortably at her laptop. She feels stiffness from sitting for prolonged periods of time.

She works from home and in an office. Her home space isn’t ideal, not only is it uncomfortable, it’s also cramped.

Client does upper and lower body toning twice per week for 20 minutes; and cardio once a week for 20 minutes. She eats healthy, clean food, likes to snack once a day, drinks 16 oz of water daily, a cup of tea or coffee daily, and a glass or two of alcohol every 2-3 days.

She describes herself as outgoing and easy going. She is experiencing mood swings from menopause and takes Estroven. No other medication for menopause is prescribed due to her cancer. She has “mad spikes”, the Estroven seems to help.

She isn’t fearful, anxious or depressed. Situational episodes push KTS to feel overwhelmed. For example, traveling with her ‘stepson’ recently was very overwhelming for her. The Client shared that when he is in the small condo with them every other week, she is anxious, and stressed by his behaviors.

Her family lives in Malaysia and Singapore. Her husband’s family is in Virginia. Her ‘step-daughter’ chooses not to meet her; the first wife doesn’t acknowledge her. Her ‘stepson’ has disabilities and recently announced his acceptance of her.

Her biological family doesn't discuss issues. This bothers her.

KTS' mom died last year in Malaysia. She was there prior to her passing and at her service. She is grieving still. One year ago, she sought help through the cancer network. She did well with the first therapist where she learned how to reframe her thoughts. Since her issue was a 'grief issue' related to her mom and not her post-cancer situation, she was required to switch therapists. The second one wasn't very helpful, she stated.

As for coping, the Client described it as 'so-so'. She walks when stressed though not enough, and doesn't feel motivated to do anything. She states that she is, "not mindful enough".

KTS has a bachelor's degree in mass communication and is employed full-time for an international non-profit as a manager doing administration and operations. She worked for them in Singapore and landed a job with them in DC after having been here for a year so she's worked for them for 5 years total. The job is mostly sedentary unless they're traveling and running programs elsewhere.

She feels she works somewhat too much; enjoys her work quite a bit; it's somewhat stressful (The department is getting split up. People are sniping and worrying, unsure of the future. She described it as a slow-burn mental stress.); it does leave enough family time. Her spouse contracts with the same organization so they often have the opportunity to travel together.

She and her spouse own the condo; it's nice, she says, and the neighborhood is quiet. She has no socioeconomic challenges nor does she face any sociopolitical or legal circumstances that one would consider to be of concern.

As for her cultural and familial experiences, she sometimes feels that she belongs to the community. She's recently connected with a group of overseas Chinese from Singapore, a women's group. She said she doesn't know any of them very well yet. She intends to continue meeting up with them. She embraces important ethics and morals but didn't expand when asked. She has experiences rejection (immediate spousal family), sometimes in the community as well; prejudice and bias because of her culture; as well as intergenerational trauma.

She feels strong ties to her spouse, immediate family, often to her extended family – all of whom often share the same values and beliefs. The client lists authenticity, loyalty, responsibility, gratitude and compassion as her most important life values which she's developed throughout her life. She has no spiritual beliefs.

KTS notes that she doesn't yet feel that she had a community or cultural group to which she connects. She feels that she has to make an effort to keep up with regular activities. She does enjoy walking, hiking, sightseeing (museums etc.), window shopping, cooking, and eating. A sense of togetherness and shared interests is important to her. As for her immediate family, she likes that they care for each other through acts of service, filial piety, and self-sacrifice.

When asked, the Client wrote that sees herself through other people's eyes. She wants to give herself more credit and not beat herself up so much.

The following question asked what else I should know about her. She wrote, "Post cancer: I am more emotional and y short term memory is not as good as before. I am keen to find a new normal where I am living fit and healthy with menopause in my life."

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Assessment

KTS 004



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CLIENT ID: KTS 004

Client's wants:	Motivated	Neutral	Wary
Description	Is currently not motivated.	Seeking emotional and physical balance, stamina, weight loss	About spirituality of yoga
Short-term Objectives		Balance and stamina.	How will we work together personality-wise?
Long-term Goals		To increase emotional and physical balance, stamina, and to lose weight.	

Plan of Care

KTS 004



KOSHAS	Session #1 24.06.30	#2 24.07.27	#3 24.08.03	#4 24.08.10	#5 24.08.17	#6 24.08.24
Anamaya (physical)	Intake Seated: Check-in, centering, Dirga Swasam, Intention, Chant Review Care Plan, filling in the blanks, ask questions, converse. Review/ Revise/ Restate Goal. Close by repeating Intention. Chanting. Check-out.	Seated: Check-in, centering, Dirga Swasam, Affirmation, Chanting OM. Konasana, C/C, Bird Dog, Balasana, Thread the Needle, Cobra, Revolved Cobra, Advasana, TT, DFD, FF, MT, Backbend, Side bends, MT. Restorative Savasana arms overhead, Full Body stretch to Wind Releasing, Supine Spinal Twist, Constructive Rest, Resting Butterfly – open hips, groin, pelvic floor; tones digestive organs, urinary tract. Guided Meditation, Chanting.	Seated on bolster w/ blocks under knees: Check-in, Centering, Dirga Swasam, Affirmation, Chanting OM. Arms floating ½ up and down 3x, then all the way up and down; Side-bend to side-twist, switch; Dandasana isometric, gentle F, R knee to chest, R arm up, back, around. Switch. W/ stacked blocks in TT, C/C, R leg back then to nose 3x, switch; FF w/ stacked blocks to standing. MT w/ block btw ft., R ft on Block, L tippy-toe, press into block, Switch; FF, Low Lunge flow, TT, sit; Dandasana, hands under R thigh, Lift	Seated in Chair: Check-in, Centering, Dirga Swasam, Affirmation, Chanting OM. Joint loosening upper body. Stand facing Chair, MT, Palm Tree, ½ FF, hands on chair, Low Lunge flow to Crescent, bent knees to ½ FF, to MT, Opposite up, Angel arms; Side. MT to W1, massaging inner upper thigh along the way lymphatic fluids to flow, to W3 w/chair, Balance, MT, Switch sides. ½ FF to Low Lunge stretching L hip flexor, Switch; TT w/ knees on blanket, Bird dog both sides; to ½ plank hold, to Crocodile. Rest. Sphinx, Revolved Sphinx, Sphinx Thread the Needle, Supported Balasana; to Seated on	Seated: Check-in, centering, <u>Intercostal Breathing</u>, Intention, Chanting OM. Supine, Stretch, Sukhasana w/ folded arms stretch overhead; Switch; Konasana w/ straight arm stretch, knees bent, T-arms, palms Stretch and explore the sensations in your body; Roll onto side. Strap / blocks /bolster / blanket, Dandasana on block, Sukhasana, Side Bends, Spinal Twist; Dandasana w' bolster on legs. Stack forearms, FF, Opp leg in front, repeat, bolster longwise, stacked arms FF; blankets between thighs/calves, bolster in front to Balasana; MT, R Arm internal	Seated: Check-in, centering, Dirga Swasam, Affirmation, Chanting OM. Close with Meditation, Affirmation, Sloka, Check-out

			Flex/Extend 5x, Cross ft over, C/C, Side-bend arm flow. Switch. TT on blocks Low Lunge; MT to W1 to Side Angle w/ blocks; Switch; Savasana, stretch, Ft wide w/ cactus arm exercise, hug; Savasana on bolster/blanket. Close with Meditation, Affirmation, Om, Check-out.	Chair or Bolster, Dynamic FF Konasana sliding hands up the inner legs, center belly and chest, to the sky, 5x, Hold FF. Roll onto back, Ft wide, Knees bent, Pelvic Tilts 5x, then allow knees to move to center, Rest. Extend arms and legs to Banana, other side. Savasana. Supported Spinal Twist to stretch the lower back, and increase lymphatic flow. Close with Meditation, Affirmation, Sloka, Check-out.	rotation; switch, Gomukhasana w/belt; Savasana, Knees to chest, Happy Baby, HB w/ Bolster on belly, Savasana, to Resting Half Moon (ease tension in lower back). Close with Meditation, Affirmation, Sloka, Check-out.
Pranamaya (breath)	Dirga Swasam w/hands on belly & heart; introduce nostril breathing on In- & exhalation.	Dirga Swasam w/hands on belly & heart; reintroduce nostril breathing on In- & exhalation.	Restorative Waterfall w/ ft on Chair. Mindful Breathing Script.	Lymphatic fluid release through deep belly breathing, inhaling through the nose, holding for 2 counts, exhaling through the mouth, holding for 4.	In Resting Half-Moon intercostals are stretched, diaphragm freed, benefits breathing, strengthens diaphragm, improves stability in core muscles, slows breathing & lowers heart rate and blood pressure, promotes relaxation.
Manomaya (emotional)	Introduce yoga as a means to relaxation and emotional balance – body, CNS, Vagus nerve.	Repetition throughout the practice of the day's affirmation. Relax and let go of any feelings and emotions.	Thich Nhat Hanh Mindful Breathing Meditation to calm the breath, body and spirit.	Moving the lymphatic fluids through massage may help to let go of certain situations where you may feel stuck, stagnant or	Observe the emotional experiences with calm abiding & openness. Experience your grief mindfully, develop a

				unmotivated.	dialogue with it. Choose when to engage with it, & when to take a break. ¹
Vijnjanamaya (witness body)	Explain that in guided relaxation and meditation Client may find calm, may be able to leave her worries behind.	Scan the body from crown to sole, notice any feelings/ sensations Guided relaxation to Guided Mediation with imagery (Water Fall with butterflies), perception of colors, smells, sounds, touch, taste.	Release physical tension, increase bodily relaxation until thinking subsides. Present moment awareness, witness from above the body, breath and mind.	Release and relax through guided relaxation. Feel how you can let after inhalation, then notice how you can let go even more right after the exhalation. Notice the space after the exhalation, and the pull of the inhalation. Let go and witness from above.	Conscious Relaxation through Guided Meditation to considering the sensations you experience. Observe with curiosity. <i>Mindfulness & Grief</i> , pp.40-44.
Anandamaya (bliss)	Chant Om 3x in beginning; Om Shanti 3x at the end; Vibrations from chanting can be soothing.	Chant Om 3x in beginning; Om Shanti 3x at the end; Restate the day's intention and peace to spread within oneself, around oneself, and on earth.	Give yourself permission to allow the moment to be exactly as it is, and allow yourself to be exactly as you are. ²	Contemplate the quote: "For the breath of life is in the sunlight and the hand of life is in the wind. - Kahlil Gibran, <i>The Prophet</i> . Is there a glimpse of the inner quiet within?	Your breath is a safe harbor. If you feel overwhelmed return to it. "Recognizing the body pattern of grief, we can learn to soften to that tension instead of feeling defeated by the idea that fear and anger are our only alternatives." Stephen Levine, <i>Unattended Sorrow</i>
YOGIC PHILOSOPHY	The body and mind are interconnected. When we feel imbalanced in one it can lead to	Experience the moment of complete stillness. Notice the feelings that emerge, the energies of your	Mindfulness means paying attention in a certain way. Being present in the moment, focused on	Our breath is the inner bridge between our body and our mind; linking the physical to the subtle When we	<u>Atmabodha</u> Trust your own self-knowledge – know your character, motivations, feelings,

¹ Stang, Heather, *Mindfulness & Grief*, London, Cico Books, 2018.

² Zinn, Jon Kabat, *Wherever You Go, There You Are: Mindfulness Meditation in Everyday Life*, New York, Hachette, 2005.

	imbalance in the other. When we practice the asanas, breath control, relaxation and meditation, we can promote physical health while nurturing mental clarity and emotional stability	own mind and heart. Hold awareness of the waterfall's essence and of your own essence, your True Nature, you who are love and compassion.	what you're doing non-judgmentally. This awakens our awareness, clarity and acceptance of present-moment reality.	inhale, we take in air, and we take in <i>prana</i>. Prana is the vital energy that sustains all creation. To control <i>prana</i> we must regulate the breath. We focus on the breath because it is a grosser, external manifestation of the <i>prana</i>. By controlling it, we gain control of the subtler <i>prana</i> within.	etc. In yoga, the term suggests both this self-insight and a deeper knowledge. In yogic philosophy, the Self is the individual soul or inner person while the higher Self is eternal and inseparable from the universe.
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Plan of Care KTS 004



Om Practice

Assigned Om Practice by Session

1. Rest in Corpse Pose (Savasana);
 - a. Set a timer for three minutes.
 - b. Slowly breathe 3x in through the nostrils and out of the mouth,
 - c. Now continue breathing in through the nostrils, filling first the belly, then lower lungs, & upper lungs with air,
 - d. Exhaling through the nostrils from the top down, focusing on your breath.
 - e. When thoughts enter the mind, simply acknowledge them then let them go by visualizing them floating away on a cloud.
 - f. Return to the breath.
 - g. When the alarm sounds, release the breath and rest.
2. Mindful Wake-up: Start with a Purpose
 - a. **On waking, sit in your bed or a chair in a relaxed posture.** Close your eyes and connect with the sensations of your seated body. Make sure your spine is straight, but not rigid.
 - b. **Take three long, deep, nourishing breaths**—breathing in through your nose and out through your mouth. Then let your breath settle into its own rhythm, as you simply follow it in & out, noticing the rise & fall of your chest & belly as you breathe.
 - c. **Ask yourself: “What is my intention for today?”** Use these prompts to help answer that question, as you think about the people and activities you will face. Ask yourself: *How might I show up today to have the best impact? What quality of mind do I want to strengthen and develop? What do I need to take better care of myself? During difficult moments, how might I be more compassionate to others and myself? How might I feel more connected and fulfilled?*
 - d. **Set your intention for the day.** For example, “*Today, I will be kind to myself; be patient with others; give generously; stay grounded; persevere; have fun; eat well,*” or anything else you feel is important.
 - e. **Throughout the day, check in with yourself.** Pause, take a breath, and revisit your intention. Notice, as you become more and more conscious of your intentions for each day, how the quality of your communications, relationships, and mood shifts.
<https://www.mindful.org/take-a-mindful-moment-5-simple-practices-for-daily-life/>

3. Daily Breath Awareness
 - a. Throughout the day observe your breath.
 - i. Notice when it is shallow and high in your chest (a stress response), and
 - ii. Lower near your belly (a relaxed response).
 - b. Pause throughout the day to practice Dirga Swasam for 30 seconds each time. Note how you're feeling.
4. Restful Asanas on the Bed
 - a. Lying on your back with your knees bent and the feet wider than hip distance apart,
 - b. Practice Pelvic Tilts 5x in one direction, pause, opposite direction, then,
 - c. Allow knees to rest together with feet still apart.
 - d. Extend arms and legs, move into Banana (supine side bend), Stretch, then switch to the other side.
 - e. Stretch arms overhead and stretch legs. Point and flex feet while stretching in opposite directions.
 - f. Rest in Savasana (Corpse pose), noticing your breath.
5. Breathe, Meditate, Walk, Swim
 - a. Focus on a word, affirmation, phrase, repeating it silently to yourself.
 - b. Have a passive disregard for any thoughts that arise; acknowledge them then let them go, returning to your focus.
 - c. Try to meditate in this manner each day for 5 minutes or more.
- 6.