



ATTICUS
FRANCHISE GROUP



Message Envy™



Incident Reporting

Training Guide
September 2024





What is an incident?

A natural or human-caused event that offers the possibility of:

- Legal risk
- Personal injury
- Damage to the Massage Envy brand
- Damage to location's reputation
- A violation of the law or a violation of the Massage Envy Code of Conduct





Types of Incidents



- **Code of Conduct by Service Providers**
 - Zero Tolerance Offenses
 - ex. Performing prohibited modality
- **Inappropriate Conduct by Service Recipients**
 - Recipient engaged in conduct that has potential to compromise the safety or wellbeing of another person.
 - ex. Service recipient exposes themselves during session
- **Service Injuries**
 - Occurs **within** the therapy room or from a retail product.
 - ex. Skin reaction
- **Personal Injuries**
 - Occurs **outside** the therapy room.
 - Ex. Slip and Fall on premises
- **All “Other” Incidents**
 - Allegation outside of the categories listed
 - ex. legal claims, theft, robbery, business closure due to weather, etc...



Automated Incident Reporting Tool:



- AIR Tool used to report all incidents
- All incidents are required to be reported in the Air Tool within **24 hours** of knowledge of the incident

Rapid Response Protocol

- Code of Conduct violations are investigated by a 3rd party company called **Redirect**.
- Redirect is a neutral 3rd party investigative team, trained to conduct unbiased investigations for highly sensitive, high-risk allegations.

Incident Reporting Binder



- Lime Green Binder centrally located in Manager's office/Front Desk*
- Contains complete protocol for reporting any/all incidents
- Contents include:
 - Incident Reporting Worksheets
 - Code of Conduct Violation, Handling and Reporting Policy
 - AIR Tool Tips and Guide
 - ME Corporate General Standards and Zero Tolerance Offenses
 - Crisis Communication Guide
 - This Power Point Presentation



How are Incidents Reported?



In Person

Team Member and/or Client may report an incident in real-time at the clinic



Phone Calls | Emails

Team Member and/or Client may report incident after it happens via phone call or email



In Moments | Social Media

Client may report an incident after it happens via In Moment survey or go straight to social media to post about their experience











Code of Conduct Violation






by

Service Provider



Zero Tolerance Offenses

- 
Inappropriate Physical Contact
 - Ex. massaging genitals/breasts
- 
Improper Draping
 - Ex. exposure of private body parts
- 
Engaging in Actions/ Discussions of Sexual Nature
 - Ex. suggestive and/or sexually explicit language
- 
Engaging in actions/discussions of a discriminatory or harassing in nature
 - Ex. use of racial slurs and/or any offensive language
- 
Engaging in actions/discussions of threatening nature
 - Ex. physical threats or acts of violence
- 
Performing unauthorized modalities
 - Ex. Shiatsu (mounting/floor work), Reiki (does not touch the body)

- 
Performing services under the influence of drugs and/or alcohol
 - Ex. impaired by any drugs/alcohol (legal or illegal)
- 
Failure to maintain, in good standing, current massage license
 - As required by law, while performing services
- 
Theft
 - Ex. Unauthorized use and/or possession of property
- 
Improper use or disclosure of personal/private client information
 - Ex. sharing private, personal information
- 
Cell phone/electronic device use during services
 - Ex. unauthorized photos or recordings



Code of Conduct Protocol: Immediate Course of Action

1



Listen and Take Notes

If possible, bring Recipient into Manager's Office/private room to listen and take notes. Write statement after recipient leaves

2



Provide Brochure

Provide "Creating a Safe Environment for your Total Body Care" brochure, highlight contact info, and offer the private room for Recipient to make any phone calls

3



Communicate

You may say: "Thank you for sharing this with me. I know it must be difficult to talk about. We take this very seriously. We retain a team of trained trauma-informed investigators to assist us with any incidents involving inappropriate conduct, they will be reaching out to you within the next 24 hours. Would you please verify the best way and time to contact you?"

4



Immediately Remove Service Provider from Schedule

If in session:

- Knock and inform Provider you are ending the session
- Have them wait in Manager's office
- Inform Service Recipient there's an emergency, reschedule and do not charge for interrupted session

5



Contact District Manager and Submit 'Report an Incident' Form in Help Center

Submit the 'Report an Incident' form ; cc'd with District Manager/Vice President /Brand President via the Atticus | JEM Wellness Help Center
<https://atticushr.zendesk.com/hc/en-us>

6



Create Code of Conduct Violation in AIR Tool

Using the Rapid Response protocol in AIR Tool, <https://massageenvy.d3securityonline.com/VSOC>, create Code of Conduct Violation and await contact from Rapid Response Investigator

Rapid Response Investigation and Report



A Rapid Response investigator will interview the Franchisee, Manager, Service Recipient, Service Provider, and any other witnesses



A summary of the investigation and determination will be emailed in the Rapid Response Report

- If there is **NOT** sufficient evidence to conclude a ZTO did **NOT** occur
 - Terminate and Restrict from Meevo
- If there **IS** sufficient evidence to conclude a ZTO did **NOT** occur
 - Reinstatement Discretion; if termination, you **cannot** restrict in Meevo



Be sure to download the Rapid Response Report to attach to 'Report an Incident' request submitted in the Help Center <https://atticushr.zendesk.com/hc/en-us>

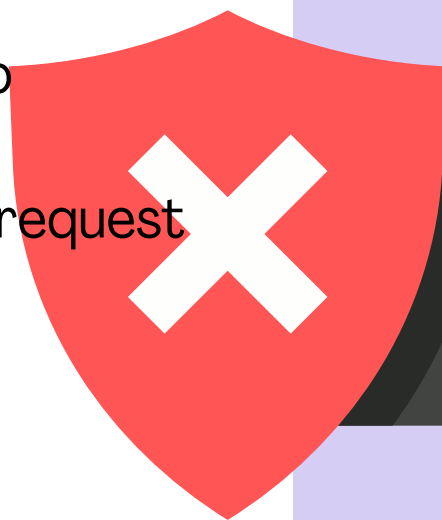


Update and Submit Incident Report

- Upload Rapid Response Report to Attachments section
- If NOT / NOT, update Incident Resolution section
- Cancel membership, if requested
- Review MEF Legal responses, if any, edit appropriate sections, and confirm updates in Notes section
- If no further action, MEF Legal will close the incident report



APPROVED



REJECTED

Important-Post Rapid Response Investigation



Upload *Rapid Response Report* to
'Attachments' Section

****Also attach to 'Incident' request in ZendeskHR****



Update 'Incident Resolution' Section

****Provided by Incident Management Team; ZendeskHR****



Update 'Notes' Section,
**"Zero Tolerance Offense has been updated in the
'Incident Resolution' Section"**

Refer to Rapid Response Protocol under the 'AIR Tool' tab in the Incident Reporting Binder



Which is not an incident?



- A. Employee falls in the parking lot
- B. Competitor is opening new location near you
- C. Therapist is threatened by Service Recipient

Which statement is true?

- A. The Rapid Response Protocol is used when reporting all incidents.
- B. The Rapid Response Protocol is used when reporting Code of Conduct Violations.
- C. The Rapid Response Protocol is used when reporting an allegation of a service reaction injury.



Inappropriate Conduct Violation by Service Recipient



Inappropriate Conduct (IC) Violation by Service Recipient

Service Recipient engaged in conduct that had the potential to compromise the safety or wellbeing of another person



While in session? Provider must immediately end session and report to Management; Not reporting is not an option



If possible, take the complainant into the manager's office to write a detailed statement. If other parties are involved:

- Get statements from all involved parties
- Schedule practical with Lead Service Provider, if advised
- Provide "Creating a Safe Environment for your Total Body Care" brochure



Create IC Violation by Service Recipient using AIR Tool



Await determination from the Incident Management Team; if IC is confirmed, cancel membership and restrict in Meevo



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ME **Message Envy**

Service/Reaction, Personal Injury, & All "Other" Incidents



Service Injury, Personal Injury, and all "Other" Incidents



SERVICE/SKIN REACTION INJURY

Skin reaction or injury allegation that occurs inside of the therapy room or from a retail product



PERSONAL INJURY

An allegation of an injury that occurs outside of the therapy room i.e.,

- Slip and Fall on premises
- Worker's Compensation for employees



"OTHER" INCIDENTS

An allegation outside of the categories mentioned;

- Legal Claims
- Clinic Closure due to weather, service outages, etc.
- Theft
- Robbery

Service/Personal/ "Other" Incidents Protocol

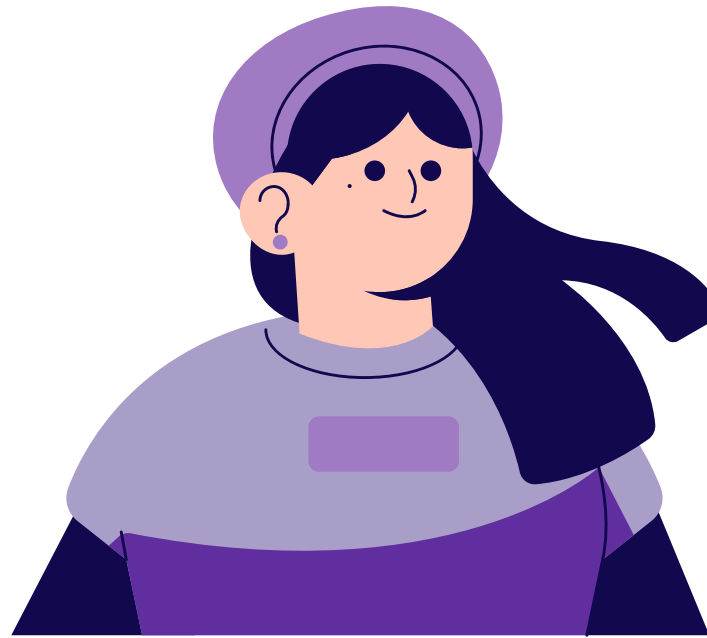
1



Contact District Manager

Notify the District Manager immediately of impending Incident Worksheet

2



Submit 'Report an Incident' Form via Zendesk Help Center

Submit the 'Report an Incident' form ; cc'd with District Manager/Vice President /Brand President via the Atticus | JEM Wellness Help Center
<https://atticushr.zendesk.com/hc/en-us>

3



Create Appropriate Incident Report in AIR Tool

Using AIR Tool,
<https://massageenvy.d3securityonline.com/VSOC>,
create appropriate incident report and await determination from Incident Reporting Management Team (HRBPs)



If IC is confirmed, you are to _____ the membership immediately and restrict in _____.

True or False?

Incidents that occur outside the therapy room are called personal injury incidents.



Submitting into AIR Tool





In the **Green Binder** you will:

- Find the tab labeled “Air Tool”
 - it is recommended that you read and understand the roll out guide.

You will complete Sections 1 - 9 before you can submit the incident report for any/all incidents.



Submitting Through AIR Tool



SAVE AS A DRAFT

Save all incident reports as a draft!! System will 'time out' after 45 minutes

COMPLETE ALL SECTIONS

Complete all sections of the Incident Report. Sections will vary by incident type

ATTACHMENTS

Attachments Section; include Wellness Chart, Therapist Notes, Intake Form etc. (No recordings)

INCIDENT DETAILS

Incident Details Section; include Summary of Incident provided by Incident Management Team, Service Provider, Service Recipient, and other witness statements

INCIDENT RESOLUTION

Incident Resolution Section; provide the resolution, if applicable, and submit the Incident Report



Submitting Through AIR Tool

Complete ALL Sections of the Report

Sections will vary by report



Section 1: General Information

Section 2: Tasks

Section 3: Notes

Section 4: Location

Section 5: Employee Information

- *NI (Numeric Identifier) - can be found in the employee's 'client' file
- Date of Hire
- Most Recent Background Check Date
- Original Background Check Date
- Most Recent Required Training Completion Date
- Service Provider School
- License Type
- License Expiration Date
- Service Provider Satisfaction Score (12 months): [Go to your In Moment Reporting/Summary by Therapist/Scroll down to their name](#) (it will be in the 3rd column).
- Total Service Hours Provided By Service Provider: [Go to the Portal Reports/Meevo Employee/ Employee Hours Sales Summary Report](#)
 - [scroll to Total Service Hours.](#)

Meevo client

Search Client > Smith, John > Main

NO IMAGE AVAILABLE

Prefix First Name Middle Name Last Name

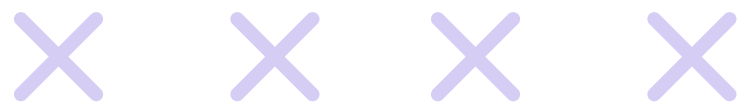
John Smith

Numeric Identifier: 16750800

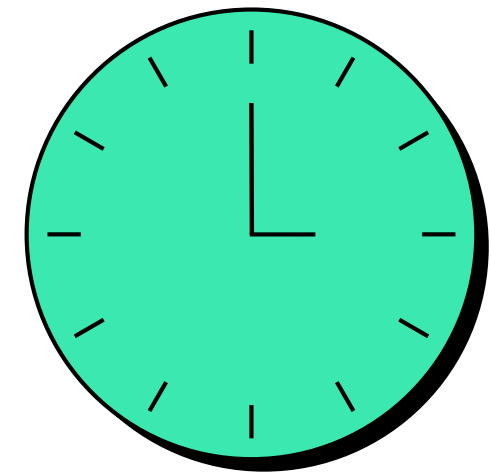
Section 6: Service Recipient Info



- Does the incident involve a member or guest?
- Name
- Email
- Numeric Identifier (NI)(will be under the client's name in their Meevo profile)
- Address
- Phone
- Gender
- Is this the Service Recipient's first service (ever)?
- Service Recipient approximate frequency of service?
- Did Service Recipient request this Service Provider?
- Is Service Recipient a member?
- Is Service Recipient a member of this location?
- Date of membership
- Have you notified the home location of this incident?



Section 7: Interview Availability & Attachments



- To ensure the proper individuals receive the Rapid Response Report fill out the Interview Availability Section
- Once Rapid Response Report is received, ***please attach to corresponding 'Incident' request in ZendeskHR located in the Help Center>Sign-In>Requests*** immediately and wait for direction from Incident Management Team. Please note that the Reports sent from Rapid Response/ReDirect are password protected. **The IR # is the password** for the RR Report.
- Attach any screenshots, statements or pictures to the Air Tool; **no videos, *attach any videos you may have to corresponding 'Incident' request in ZendeskHR located in the Help Center>Sign-In>Requests.***
- Upload emailed (completed) Rapid Response Report to this section

IR [Draft] New Incident Report - Code of Conduct Violation by Service Provider

General Information
Tasks
Notes
Location
Employee Information
Service Recipient Info
Interview Availability
Attachments
Incident Response
Incident Resolution

Did the Manager have direct contact with the Service Recipient? *
 Yes No

Who is the main point of contact? *
 Contact Details None

Who would like to observe the interviews? (Select all that applies) *
 Franchisee None Manager

Redirect to email the Rapid Response Report directly to the following recipient(s): (Select all that applies) *
 Franchisee Other Manager

Franchisee Name: *
Melissa Francois

Franchisee Email: (Must be a Message Envy Email) *
Melissa.Francois@messageenvy.com

Manager Name: *

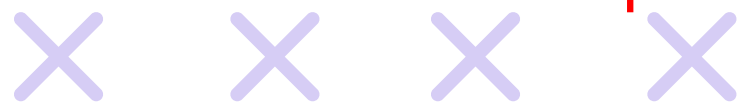
Manager Email: (Must be a Message Envy Email) *

Other Name: *

Other Email: (Must be a Message Envy Email) *

Service RECIPIENT Availability

- Franchisee Name: Ali Maddocks
- Franchisee Email: support@atticushr@zendesk.com
- Manager Name: Specific Name of Manager
- Manager Email: Specific Email of Manager
- Other Name: Respective DM/VP
- Other Email: DM/VP Email



Section 8: Incident Details



- Incident reported: In person, Email, etc.
- Reported By: Jane Doe
- Summary of Incident: **This will be provided to you by the Incident Management Team.**

Example: The therapist reported the client was inappropriate. We have restricted the client during the investigation.

Section 9: Incident Response

Was the brochure provided to the Service Provider?

Was a private room offered?

Did the Service Provider contact law enforcement?

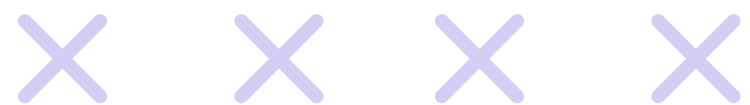
Did the Service Provider contact RAINN?

Was service ended early?

Have you notified your insurance carrier? **Always Mark YES**

Did the Service Provider and the Service Recipient have any contact outside of the franchised location? **If "Yes", create Code of Conduct Violation by Service Provider**

Incident Report



Section 10: Incident Resolution

Questions To Pay Attention To:

Have you notified your insurance carrier? **Always Mark YES**

Does your state allow anonymous reporting?

Mark the appropriate answer for your clinic

Colorado – YES Florida – YES Utah - YES Virginia - YES South Carolina - NO Tennessee - NO

Georgia – NO Minnesota – NO North Carolina – NO Nevada – NO

Did you report this incident to your state licensing board?

You will get directions on this from the Incident Management Team via ZendeskHR

Select the type of behavior(s)

You may need to hold down the ctrl key for multiple selections

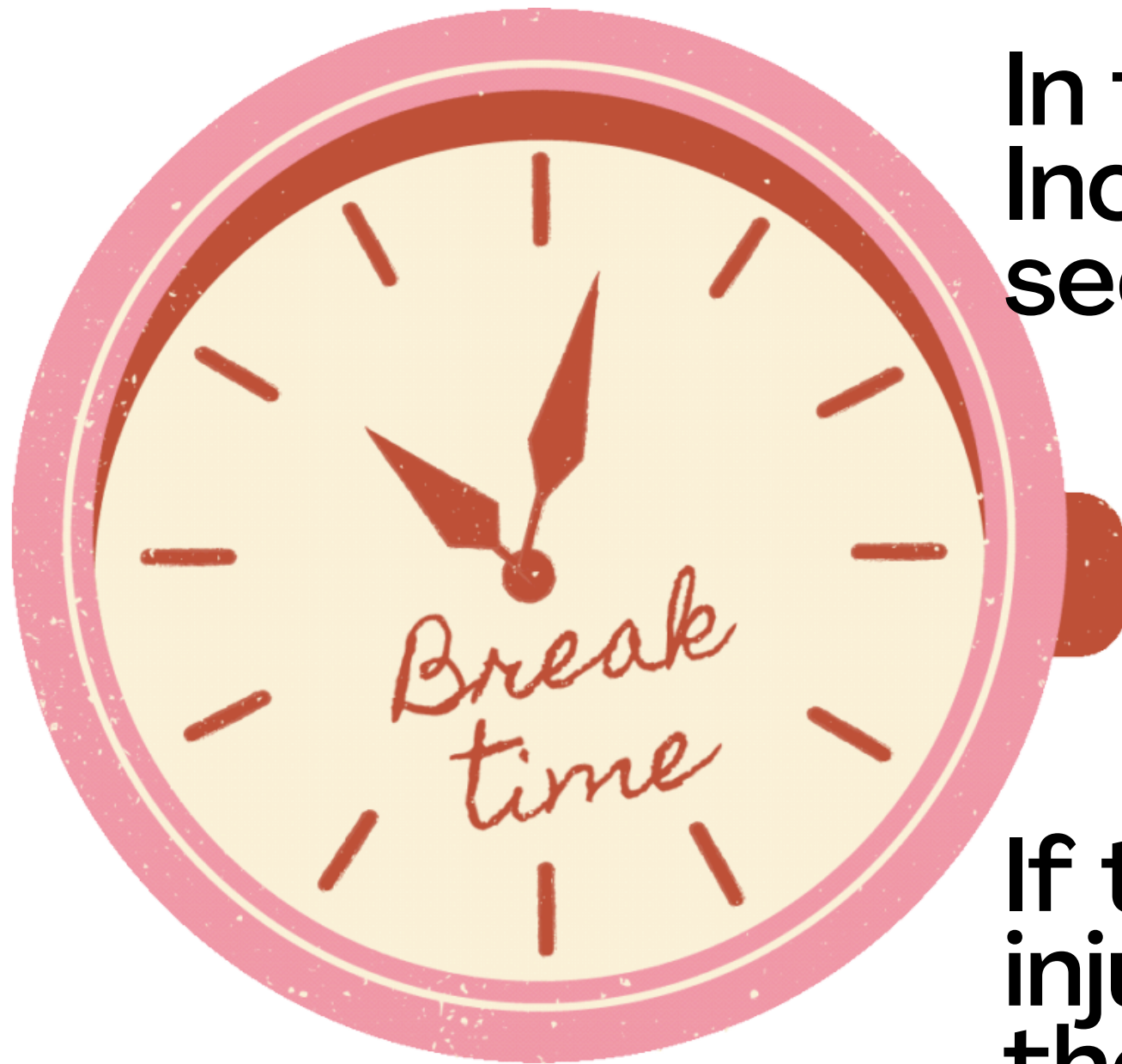
Was the Service Recipient restricted?

Was inappropriate conduct alleged?

Submitter's Email Address

Submit!





In the Incident Details Section of the Incident Report, what are you to post in this section?

- A. Summary of the incident provided by the Incident Management Team
- B. Summary of incident provided by the Service Provider
- C. Summary of the incident provided by the Service Recipient

If there is an allegation of Service/Reaction injury, the Service provider should meet with the Service Recipient to discuss the incident, True or False?

CM's and DM's: When you have an active incident it is your responsibility to monitor communications and instructions from the Air Tool and Incident Management Team for any questions/issues that ME Corporate or Atticus Franchise Group may have.

Did you remember:

✓ **All Air Tool requests must be responded to within 24 hours.**

✓ **Before you can put a Service Provider, who has been removed from the schedule, back on the schedule the Incident Management Team will need to approve it.**

✓ **Communicate to the Service Provider and the Service Recipient where they stand in regards to Massage Envy.** These actions are determined by the Incident Management Team.

Do you need to term/restrict an employee?

Do you need to write up an employee?

Do you need to cancel/restrict the client?

Does the client know what being "restricted" means?

"Closing the Circle"



Need to update an incident report?

To re-open a closed incident you can do one of two things:

1. Email locationcompliance@massageenvy.com and request the specific IR # be reopened. This is typically done within the hour.

OR

2. Create a task to have MEF Legal re-open the incident report follow these steps:

- Click the “Add New” button at the top left corner of the page and instead of selecting Incident Report, select Task.
- After clicking Task, select the Task Type using the drop-down box:
- After Selecting ‘Request to reopen incident’, select the IR Request Tab located on the left and enter the Incident Report Number and the Category of the Related Incident:
- Click Submit
- After you click submit, MEF Legal will receive a task notification to reopen the report. After the report has re-opened, you can add additional information and/or upload documents and make sure to click save.

[Draft] Create a New Task - Request to reopen incident report

Save as Draft Submit Cancel

General Information

IR Request

MEF Legal

Attachment

Task Type: Request to reopen incident report

Do not use

Priority

Phase: Phase 1

Sort Order

Created By: Boulder (0133) Kim Zimmerman

Assigned To: Boulder (0133) Kim Zimmerman

Time Zone: MST

Assigned On: 05/21/2019 02:20 PM

Due Date: 05/21/2019 02:20 PM

Completion Date: 05/21/2019 02:20 PM

Use Email Notification Assignment Rules On Task Action, Notify CC Recipients

On Task Create and Edit, Notify Creator On Task Create and Edit, Notify Assignee

On Task Close, Notify Creator On Task Close, Notify Assignee

[Draft] Create a New Task - Request to reopen incident report

Save as Draft Submit Cancel

General Information

IR Request

MEF Legal

Attachment

Incident Report number:

Category of the Related Incident





Questions?



