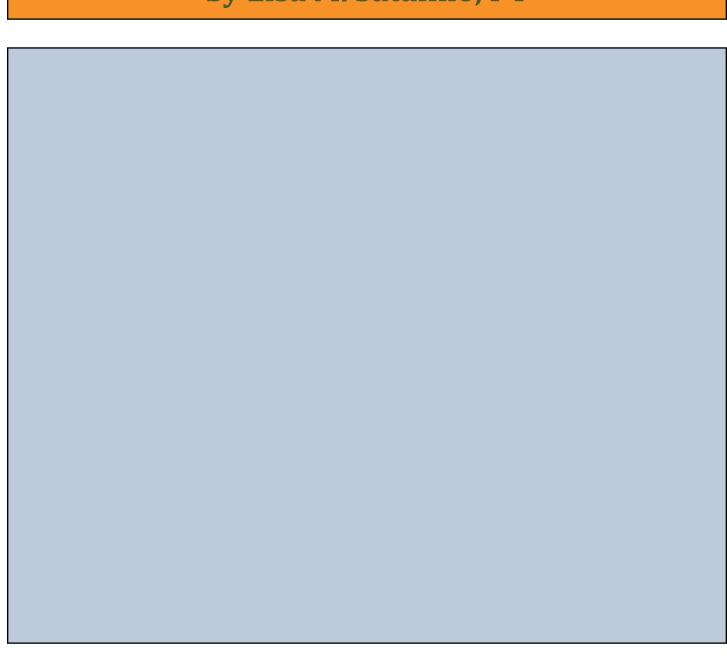


# Upper and Lower Quarter Screening: Assessment Tools for Maximizing the Benefits of Your Treatment Plan by Lisa M. Satalino, PT



# Upper and Lower Quarter Screening: Assessment Tools for Maximizing the Benefits of Your Treatment Plan

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### **Upper and Lower Quarter Screening**

Upper and Lower Quarter Screening: What are they and why do we do them?

A screening exam is a quick overview of several body regions and/or systems which are meant to provide the therapist with enough evidence to direct attention to a specific region or system for a more thorough evaluation. It provides the therapist with a road map to a final destination.

In general if a screening exam is negative it should be repeated to ensure nothing was originally missed. If no abnormalities are found after a repeat of the screening and the client's symptoms persist or worsen the therapist should refer the client to their physician for additional medical testing and diagnosis.

An **Upper Quarter Screen** consists of a series of mobility and neurological tests to identify problem areas in the cervical spine, shoulder, elbow, wrist, and hand.

A **Lower Quarter Screen** consists of a series of mobility and neurological tests to identify problem areas in the lumbar spines, sacroiliac region, hip, knee, ankle, and foot.

### Below are charts summarizing the Upper and Lower Quarter Screening Tests:

Upper Quarter Screen	
Postural Assessment – Standing- Observation and Palpation	
Active ROM Cervical Spine - Sitting	
Passive over pressure if symptom free	
Resisted muscle tests for cervical spine: Cervical Rotation	C-1
Resisted Shoulder Elevation	C-2,3,4
Resisted Shoulder Abduction	C-5
Active Shoulder, Elbow, Wrist ROM	
Resisted Elbow Flexion	C-6
Resisted Elbow Extension	C-7
Resisted Thumb Extension	C-8
Resisted Finger Abduction	T-1
Babinski's Reflex Test	UMN

Lower Quarter Screening	
Postural Assessment - Standing	
Active Forward, Backward, and Lateral Bending	
of Lumbar Spine – Standing	
Squat Test to clear all LE joints in weight bearing	
Toe Raises	S-1
Heel Walking	L-4,5
Active Rotation of Spine - Sitting	
Over-Pressure if symptom-free	
Straight Leg Raise – Supine – Add Cervical flexion	L-4,5,S-1
For Dural Tube test	
Sacroiliac Spring Test - Supine	
Resisted Hip Flexion - Supine	L-1,2
Passive Range of Motion Hip Movements - Supine	
Resisted Knee Extension - Sitting	L 3-4
Active Knee Rom - Sitting	
Femoral Nerve Stretch - Prone	
Babinski's Reflex Test	UMN

**Prior to either the Upper or Lower Quarter Screen** being completed a thorough intake and interview should be conducted with the client.

On pages 3 through 7 you will find forms for Upper and Lower Quarter Data Collection and a Pain Index Interview.

The Upper and Lower Quarter Data Collection Form may be used during your Initial Evaluation while the Pain Index From can be issued to the client and returned on the next scheduled visit or prior to the Initial Evaluation.

**Following the Upper or Lower Quarter Screening** process, evaluations to the particular region of the body affected should be completed.

You will find the following Guidelines to assist you in additional evaluation:

Shoulder Evaluation – pages 8-10

Elbow, Wrist, and Hand Evaluation – pages 11-14.

**Hip Evaluation** 

**Knee Evaluation** 

Ankle/Foot Evaluation

# Patient Data Collection for Upper and Lower Quarter Screening

Date: Name: DOB: Diagnosis:
PMH:
PSH:
Subjective:
Primary Complaint:
Nature: Sharp, dull, tingling, constant intermittent, etc.?
Location: Where is it?
Onset: When did it start? Can you relate it to any trauma, injury, etc.?
Course and Duration: How long does it last and have the symptoms changed over time? Is it acute or
chronic?
Behavior: What increases or decreases pain? Is pain positional or situational? Does it get better or worse as day progresses, etc.?
Effect of Previous Treatments:
Objective:
Structural Assessment: Postural evaluation in sitting, standing, prone, and supine.
Mobility: ROM of structures involved.
Neurological: Myotomes and Dermatomes

Special Tests: Done per joint		
Additional tests available: Reports from physician, x-rays, etc.		
Assessment:		
Short Term Goals:		
Long Term Goals:		
Client Goal:		
Plan:		
Treatment plan and sequence		

Palpation: Soft tissue and fascial mobility

# **Pain Index Survey**

Name: Date of Diagnos Domina Date:	
1.	Please describe the location of your pain and rate the pain from 1-10 with 10 being the most severe pain and 1 being minimal pain.
2.	How long have you been experiencing this pain?
3.	Name 4 activities in the order of significance/importance which presently create difficulty and/or pain. Describe the difficulty you are having with each activity.

4.	Please describe the effect each of the following has on your pain/function:	
	a. Prolonged positioning/activity:	
	b. Specific positions (i.e. standing, sitting, lying down) that increase or decrease your pain.	
	c. Direct Pressure:	
	d. Weight bearing (i.e. Upright activities versus resting.):	
5.	Are you on any medications? How do they effect your symptoms?	

6.	Are you experiencing feelings of anxiety, depression, or fear on a regular basis? Does your mind
	"race" when you are not busy?
7.	What concerns you most in your life at this time?
8.	Please describe your symptoms within a 24-hour day. (I.e. How are your symptoms in the morning versus the night? How well do you sleep? If you wake up during the night, how long does it take you to get back to sleep? What do you do to get back to sleep? Do you need rest periods to function throughout your day?)
9.	What are three specific activities or goals that you would like to achieve or accomplish in the next 6 months?

### **Shoulder Evaluation**

- 1. Upper Quarter Screening
- 2. Observation and Inspection Specific to Shoulder
  - Posture
  - Functional Movement
  - Symmetry
  - Signs of Trauma
  - Deformities or Dislocations
  - Scapular Position (winged?)
- 3. Active ROM
  - Adduction (45 degrees)
  - Abduction Distinguish scapular and humeral articulation (0-180 degrees)
  - Extension (0-45 degrees)
  - Internal Rotation (0-55 degrees)
  - External Rotation (0-45 degrees)
  - ? Painful Arc during Abduction or Flexion
  - Apley's Scratch Test (Most people with a frozen shoulder can't do this.
     Adduction/IR Touch hand to opposite shoulder anterior surface
     Abduction/ER Touch hand to opposite shoulder posterior surface
  - Note Acromioclavicular and Sternoclavicular articulations.
- 4. Passive ROM
  - Same as above but note pain and end feels.
- 5. Resisted ROM
  - Flexion: Anterior Deltoid

Coracobrachialis

**Pectoralis Major** 

**Biceps** 

Extension: Latissimus Dorsi

Teres Major

Posterior Deltoid

**Teres Minor** 

Triceps (long head)

• Abduction: Middle Deltoid

Suprasinatus

**Serratus Anterior** 

External Rotation: Infraspinatus

**Teres Minor** 

Posterior Deltoid

• Internal Rotation: Subscapularis

Pectoralis Major

Latissimus Dorsi

Teres major

Scapular Elevation: Trapezius

Levator Scapulae

Rhomboid major/minor

- Scapular Protraction: Serratus Anterior
- Scapular Retraction: Rhomboid Major/minor

Trapezius

- Note Pain: If pain with contraction this is contractile tissue pain vs. pain from inert tissue
- Note weakness: Is this from disuse or neurological involvement?
- 6. Neurological Evaluation:
  - Sensation: Tactile or with hot/cold:

Check Dermatome charts.

Axillary nerve is most often involved. This would result in sensation change over the deltoid (C-5.)

If loss of sensation in axillary fold (C4.)

If loss of sensation over nipple area (T4.)

• Reflex Testing: Biceps - C6

Triceps - C7

- Proprioception Place one upper extremity and a position and note clients reproduction of this position with opposite side – eyes closed.
- 7. Palpation: Swelling

**Tender Spots** 

Bursae

Brachial Pulse - elbow

Joint Capsule

**Fascial Integrity** 

Muscle Spasm/Trigger Points

- 8. Special Tests:
  - Yergason Test: Tests stability of biceps tendon in bicipital groove.

Place shoulder in neutral and elbow at 90 degrees flexion against body. Apply traction and ER to humerus.

Tendon will pop out of biciptal groove if T-ligament isn't stable.

 Drop Arm Test: Indicates tear of rotator cuff muscles. (Differentiate via resisted muscle testing.)

Place UE at 90 degrees of shoulder abduction. Tap UE. If complete rupture arm will drop. If incomplete tear there will be weakness.

- Apprehension Test: ? recurrent shoulder dislocation.
   In supine. Shoulder in abduction. Place hand over anterior humeral head. ER humerus.
   If previous dislocation patient will be apprehensive with ER.
- Tests for Thoracic Outlet Syndrome. (Subclavian artery and Brachial Plexus compression.)

Adson's (Tests Sclaneus-anticus and cervical rib syndromes): Patient takes a breath and holds it while extending and rotating head to toward side tested. Examiner assesses radial pulse on side tested. This is positive if pulse diminishes or symptoms are reproduced.

Wright's Test (Tests Costoclavicular Syndrome): patient takes a deep breath and holds while retracting and depressing shoulders. Examiner assesses radial pulse on tested side. This is positive if pulse diminishes or symptoms are reproduced.

Hyperabduction Syndrome (Entrapment under pec minor /coracoid process): Therapist brings UE into Hyper horizontal abduction with ER while palpating radial pulse.

This is positive if pulse diminishes or symptoms are reproduced.

### Elbow, Wrist, and Hand Evaluation:

- 1. Upper Quarter Screening.
- 2. Observation and Inspection:
  - Observe functional use of forearm.
  - Observe obvious deformities.
    - a. Carrying angle of elbow. -5 degrees in males. 10-15 degrees in females.
    - $b. \quad \hbox{Cubitus valgus} \hbox{greater than normal carrying angle}.$ 
      - Cubitus varus less than normal carrying angle.
    - c. "Dinner fork" deformity Colles fracture malunion. (radius sticks up anterior.)
    - d. Ganglia cysts.
    - e. Heberden nodes (due to OA bony nodules.)
    - f. Observe nails:

Color – whitish pale could indicate anemia or circulation problems.

Contour – Spoon nails (concave) could indicate fungal infection. Clubbed nails (domed) could indicate respiratory or congenital heart problems.

• Contour of palmar surface of hands:

Transverse arches

Asymmetry

Muscular Atrophy

Intrinsic muscles

### 3. Active ROM

Elbow

Flexion

Extension

Supination

Pronation

Wrist

Flexion

Extension

**Ulnar Deviation** 

**Radial Deviation** 

Supination

Pronation

Hand

MCPJ Flexion and Extension

**IPJ Flexion and Extension** 

Finger Abduction and Adduction

Thumb Adduction, Abduction, Opposition

### 4. Passive ROM

Same as above but note pain and end feels.

### 5. Resisted ROM

### Elbow Flexors

Briachialis - C5, C6

Biceps – C5, C6

Brachioradialis - C6, T1

Supinator

### • Extensors:

Triceps – C7

Anconeus

### Supinators:

Biceps – C5, C6

Supinator – C6

Brachioradialis - C6, T1

### • Pronators:

Pronator Teres - C6

Pronator Quad - C8, T1

### Wrist Flexors/Pronators:

Pronator Teres - C6

Flexor Carpi Radialus – C7

Palmaris Longus -

Flexor Carpi Ulnaris - C8, T1

Brachioradialus - C6, T1

### • Extensors:

Extensor Carpi Radialus Longus - C8, T1

Extensor Carpi Radialus Brevis – C6, C7

Extensor Carpi Ulnaris - C7

### Hand Flexors:

Distal IPJ – Flexor Digitorum Profundis

Proximal IPJ – Flexor Digitorum Superficialus – C7, C8, T1

MCP - Lumbricals - C7, C8

Extensors:

Extensor Digitorum Communis - C7

Extensor Indicis - C7

Extensor Digitorum Mini – C7

Abduction:

Dorsal Interrosi - C8, T1

Abductor Digit Mini – C8, T1

Adduction:

Palmar Interrosi – C7, C8, Ulnar nerve

### Thumb:

MCP Flexion

Flexor Pollicus Brevis – medial – C8, Ulnar nerve. Lateral – C6, C7, Median Nerve

**IPJ Flexion** 

Pollicus Longus - C8, T1

MCP Extension

Pollicus Brevis - C7

**IPJ Extension** 

Pollicus Longus - C7

Abduction

Pollicus Longus – C7

Pollicus Brevis - C6, C7

Adduction

Adductor Pollicus - C8, Ulnar Nerve

### 6. Neurological Evaluation:

Sensation: Tactile or with hot/cold.

Check Dermatome Charts.

• Reflex Testing: Biceps- C6

Triceps - C7

Brachioradialus - C6

- Proprioception reproduction of arm positioning with eyes closed.
- Stereognosis rapid supination/pronation

### 7. Palpation: Swelling

**Tender Spots** 

**Temperature** 

Pulse - Brachial (Elbow,) Radial and Ulnar (Wrist.)

Joint Capsule

**Fascial Integrity** 

Muscle Spasm/Trigger Points

### 8. Special Tests:

### • Elbow:

Valgus/Varus Torsional Tress – to test ligament stability.

Tinel Sign – Ulnar groove – tap for Ulnar nerve sensitivity.

Tennis Elbow Test – Flex elbow to 90 degrees with forearm pronated. Resist wrist extension. Positive if reproduction of pain at common extensor origin.

Golfer's Elbow: Flex elbow to 90 degrees with forearm in supination. Resist wrist flexion. Positive if reproduction of pain at common flexor origin.

### • Wrist/Hand:

Tinel Sign - ? Carpal Tunnel Syndrome – Tap over volar carpal ligaments. If Median nerve is sensitive this will be painful.

Phalens Test – ? Carpal Tunnel Syndrome – Patient places dorsum of hands together with fingers pointing down. Push hands together. This will irritate the Median nerve if positive.

Allen Test – Patency of digital arteries. – Patient "pumps" hand. Therapist gently constricts radial and Ulnar pulses. Patient opens hand and therapist releases arteries. Hand should turn pink.

Finkelstien Test – patient tucks thumb into fist and squeezes. If there is stenosis of the abductor Pollicus Longus/extensor Pollicus Brevis due to tenosynovitis this will be positive.

### **Hip Evaluation:**

- 1. Lower Quarter Screening
- 2. Questions Specific to Hip Pain
  - Can patient sleep on involved side?
  - Does the pain occur at any particular point in the gait cycle?
  - What is the pain like with activities such as sustained flexion?
  - Recent weight gain/loss?
- 3. Observation and Inspection Specific to Hip
  - Gait analysis Trendelenburg gait?
  - Static postural exam
  - Femoral Torsion
  - Tibial Torsion
  - Symmetry
  - Signs of Trauma
  - Signs of Deformity
  - Unequal weight bearing
- 4. Active ROM
  - Hip Flexion (0-115 degrees)
  - Hip Extension (0-30 degrees)
  - Hip Abduction (0-50 degrees)
  - Hip Adduction (0-30 degrees
  - Hip Internal Rotation (0-45 degrees)
  - Hip External Rotation (0-45 degrees)
- 5. Passive ROM
  - Same as above but note pain and end feels.
- 6. Resisted ROM
  - Flexion: Psoas major

Iliacus

Sartorius

**Rectus Femoris** 

**Pectineus** 

• Extension: Gluteus Maximus

Semitendinosus

Semimembranosus

Biceps Femoris (long head)

• Abduction: Gluteus Medius

Tensor Fasciae Latae

Gluteus Minimus

Adduction: Gracilus

**Adductor Brevis** 

Adductor Magnus

Adductor Longus

Internal Rotation: (Secondary Function)

Semitendinosus

Semimembranosus

Adductor Magnus (posterior portion)

Gracilus

Gluteus Minimus

Gluteus medius

External Rotation: Piroformis

**Quadratus Femoris** 

**Obturator Internus** 

**Obturator Externus** 

**Gemellus Superior** 

**Gemellus Inferior** 

- 7. Neurological Evaluation: (Previously cleared in Lower Quarter Screen)
  - Sensation: Tactile or with hot/cold

Check Dermatome charts.

- Myotomes refer to Lower Quarter Screen
- Reflex Testing: Infrapatellar L 3-4

Achilles Tendon - S 1-2

- Proprioception
- It should be noted that the three nerves most commonly involved in hip disorders are the Sciatic nerve (resulting in posterior hip and thigh pain,) the Femoral nerve (decreased sensitivity to the anterior or medial aspects of thigh,) and the Obturator nerve (referring pain from hip to medial thigh or knee.)
- 8. Palpation: Swelling or hot spots
  - Tender Spots
  - Bursae
  - Femoral Pulse Groin
  - Joint Capsule
  - Fascial Integrity
  - Muscle Spasm/Trigger Points
  - Muscle Tone and symmetry of buttocks
- 9. Special Tests:
  - Leg Length Supine
  - Thomas Test Iliopsoas and Rectus Femoris Length Can also indicate Iliopectineal Bursitis.

- Ober Test ITB tightness Sidelying. Short fibers of TFL can be evaluated by flexing knee.
- Fabere's Test for Arthritis Supine with hip in flexion and ER. Support opposite iliac crest.
- Provocation Tests:

Posterolateral Capsule – Compression through hip with flexion, adduction, IR. Do Not Do This if patient has had a hip replacement!!!

Oscillations through straight leg – heel. Supine

- Pirofomis Sidelying
- Bilateral Internal/External Rotation in Prone
- Adductor flexibility –knee extended and knee bent to eliminate influence of Gracilus m.

### **Knee Evaluation**

- 1. Lower Quarter Screening.
- 2. Observation and Inspection
  - Posture
  - Functional Movement
  - Gait
  - Effusion Take anthropometric measurements if swelling present
  - Deformities
  - Signs of Trauma
  - Q angle
- 3. Active ROM
  - Flexion: (0-135 degrees)Extension: (0-180 degrees)
- 4. Passive ROM
  - Same as above but note pain and end feels.
  - If there is a torn or displaced meniscus there is often an abrupt block in flexion or extension.
- 5. Resisted ROM:
  - Flexion Hamstring Group

Gastrocnemius

**Popliteal Muscles** 

• Extension: Rectis Femoris

Vastus Lateralis

Vastus Medialus

Vastus Intermedius

Vastus Medialus Obliquus

- Note Pain or weakness.
- Note that if there is pain prior to resistance it is most likely acute. Pain during resistance is most likely subacute. Pain after resistance is generally more chronic.
- 6. Special Tests
  - Medial Collateral Ligament Test Knee in 30 degrees flexion and full extension. Assess at medial joint line – exert valgus force.
  - Lateral Collateral Ligament Test Knee in 30 degrees flexion and full extension. Assess at lateral joint line exert varus force.
  - Anterior Drawer Test Assesses Anterior Cruciate ligament.
  - Posterior Drawer Test Assesses Posterior Cruciate ligament.
  - Apley's Distraction Test Tests collateral ligaments and Meniscus with ER and IR.
  - Apley's Distraction Test Tests collateral ligaments and Meniscus with ER and IR.
  - Patella Femoral Grinding Test
  - Tinel Sign for Saphenous Nerve Neuroma medial border of patella.

### **Ankle/Foot Evaluation**

- 1. Upper Quarter Screening
- 2. Observation and Inspection
  - Gait
  - Static Exam of Relaxed Calcaneal Stance vs. Subtalar Neutral
  - Shoe Exam
  - Edema unilateral or bilateral. Bilateral could indicate cardiac or lymphatic problems
  - Deformities

Pes Planus/Pes Cavus

Hallux Valgus/Hallux Rigidus

Claw Toes - Flexor Digitorum Brevis usually is the cause of this

**Hammer Toes** 

Corns – areas of tenderness

- Calluses
- Signs of Trauma

### 3. Active ROM

- Ankle joint: Dorsiflexion (0-20) 10 degrees of Dorsiflexion necessary for normal walking.
   Plantarflexion (0-50)
- Subtalar Joint: Inversion (0-5)

Eversion (0-5)

• Toes: First Toe Flexion (0-40)

First Toe Extension (0-70) 45 degrees flexion is necessary in big toe for normal gait.

### 4. Passive ROM

• Same as above but note pain and end feels

### 5. Resisted ROM

• Plantarflexion:

Peroneus Longus

**Peroneus Brevis** 

Triceps Surae (Gastrocnemius and Soleus)?>

Flexor Hallicus Longus

**Tibialus Posterior** 

Flexor Digitorum Longus

Dorsiflexion

**Tibialus Anterior** 

**Extensor Hallicus Longus** 

**Extensor Digitorum Longus** 

**Peroneus Tertius** 

Inversion/Adduction

**Extensor Hallicus Longus** 

**Tibialus Anterior** 

**Tibialus Posterior** 

Flexor Digitorum Longus

Flexor Hallicus Longus

Triceps Surae

• Eversion/Abduction:

**Peroneus Longus** 

Peroneus Brevis

**Peroneus Tertius** 

**Extensor Digitorum Longus** 

• Toe Extension

**Extensor Digitorum Brevis** 

Toe Flexion

Interossei

Flexor Digitorum Brevis

Lumbricals

First Toe Flexion

Flexor Hallicus Brevis

Flexor Hallicus Longus

First Toe Extension

**Extensor Hallicus Longus** 

### 6. Neurological Evaluation

• Sensation: Tactile or with hot/cold

Check Dermatome charts.

• Reflex Testing: Achilles Tendon (S1)

Proprioception

### 7. Palpation:

- Swelling
- Tenderness
- Temperature

### 8. Special Tests:

Ligament Injuries:

Anterior Draw Test – Anterior Talofibular ligament

Valgus Stress Test – Medial Collateral Ligament

Varus Stress Test – Lateral Collateral Ligament

Test for Rigid/Supple Pes Planus – Spring ligament

Muscular Injuries:

Thompson (Simmonds) Test – AT rupture

Ankle Plantarflexion Test – Differential for Soleus and Gastrocnemius

Circulation:

Posterior Tibial Artery – Groove medial malleolus – primary blood supply to foot

Dorsalis Pedia – secondary blood supply to foot – Between EHL/EDL tendons (absent in 15% population)

Homan's Sign – (Deep Vein Thrombophlebitis) – Don't do this until you know if patient is prone to blood clot.

Long Saphenous Vein (Medial Malleolus) This will be prominent with varicose veins and is prone to blood clot

• Anthropometric Measurements:

Mid-Tarsal
3 cm above medial malleolus
Mid shaft of tibia
Compare with other leg

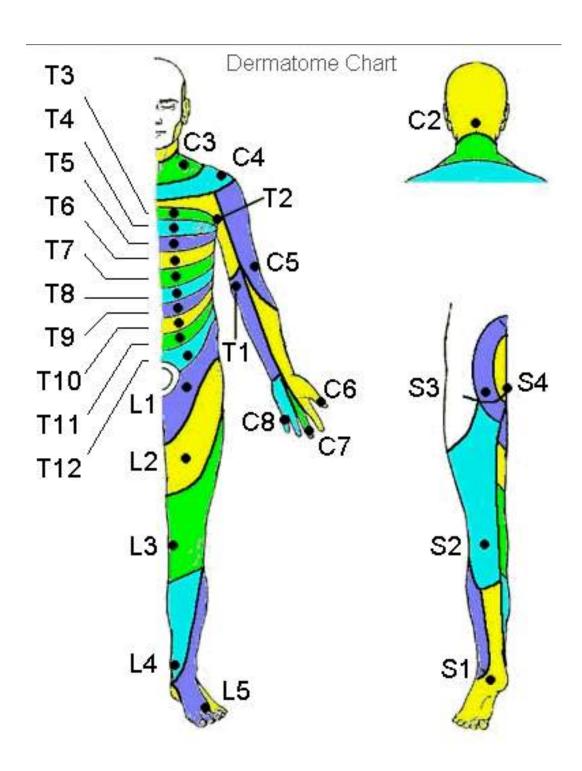
Pronation – Triplane motion at subtalar joint – Calcaneal eversion, abduction, and dorsiflexion.

Supination – Triplane motion at Subtalar joint - Calcaneal inversion, adduction, and plantarflexion.

# **Quick Reference Guide**

Upper Quarter Screen	
Postural Assessment – Standing- Observation and Palpation	
Active ROM Cervical Spine - Sitting	
Passive over pressure if symptom free	
Resisted muscle tests for cervical spine: Cervical Rotation	C-1
Resisted Shoulder Elevation	C-2,3,4
Resisted Shoulder Abduction	C-5
Active Shoulder, Elbow, Wrist ROM	
Resisted Elbow Flexion	C-6
Resisted Elbow Extension	C-7
Resisted Thumb Extension	C-8
Resisted Finger Abduction	T-1
Babinski's Reflex Test	UMN

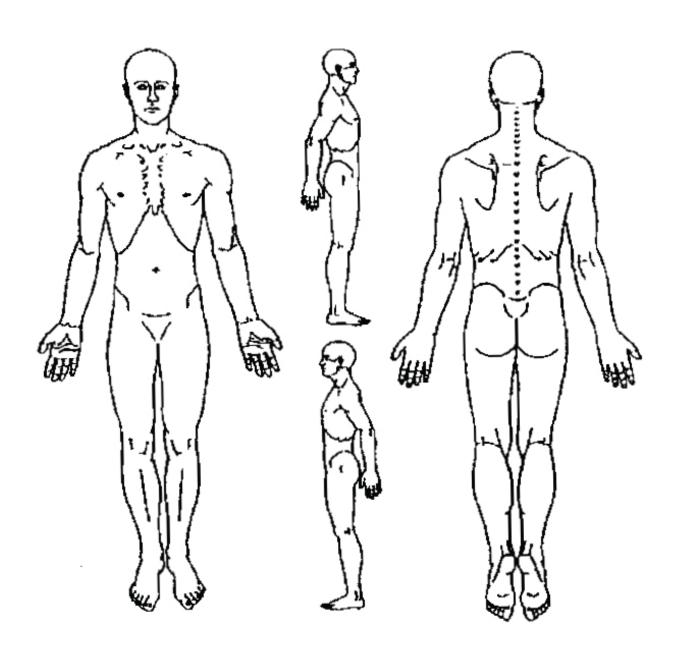
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Active Forward, Backward, and Lateral Bending	
of Lumbar Spine – Standing	
Squat Test to clear all LE joints in weight bearing	
Toe Raises	S-1
Heel Walking	L-4,5
Active Rotation of Spine - Sitting	
Over-Pressure if symptom-free	
Straight Leg Raise – Supine – Add Cervical flexion	L-4,5,S-1
For Dural Tube test	
Sacroiliac Spring Test - Supine	
Resisted Hip Flexion - Supine	L-1,2
Passive Range of Motion Hip Movements - Supine	
Resisted Knee Extension - Sitting	L 3-4
Active Knee Rom - Sitting	
Femoral Nerve Stretch - Prone	
Babinski's Reflex Test	UMN



# **End Feel Chart**

Name of End Feel	Description of End Feel
Capsular	Leathery Example: Normal Glenohumeral ER
Spasm	Firm, contracting muscle Example: Cramping Muscle
Springy	Bounces Back Example: Internal joint derangement, "loose" bodies, "bucket handle" meniscus tear
Bone-on-bone or "hard" end feel	Hard, solid, unmovable Example: Normal elbow extension
Tissue approximation	Further range of motion is prevented or impeded by opposition of two tissues Example: Maximum knee flexion (posterior leg touches posterior thigh)
Empty	Feels like more movement is there but is unobtainable Example: referred pain or metastasis

# Sample Body Chart



# **Bibliography and Recommended Reading List**

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- 2. Orthopedic and Sports Physical Therapy Gould and Davies. Mosby Company, 1985.
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