



THE IV HYDRATION BUSINESS HEALTH *CHECK*

25 QUESTIONS EVERY IV HYDRATION BUSINESS OWNER SHOULD BE ABLE TO ANSWER IN 2026



A self-assessment to help you evaluate your practice across compliance, operations, safety, financial health, and growth.

STEP 1: COMPLETE THE ASSESSMENT

Running an IV hydration business takes more than delivering great patient experiences. Today's operators need to stay informed on evolving regulations, maintain strong documentation, protect patient safety, manage the business behind the scenes, and continuously find new ways to attract and retain patients.

How healthy is your IV hydration business?

This 25-question assessment is designed to help you identify where your practice is strong—and where you may have opportunities to improve.

Choose the answer that best describes your business today, add your points, and discover where you stand.

Important: This assessment is intended for educational and business-awareness purposes only. It is not legal, medical, financial, or regulatory advice and does not replace guidance from qualified professionals.



SECTION 1

COMPLIANCE & REGULATORY AWARENESS

1. How confident are you that your IV hydration business is operating in accordance with the requirements that apply in your state?

- [A] Very confident. We regularly review applicable requirements and have processes in place to address changes. (0 pts)
 - [B] Mostly confident, but we don't have a formal process for monitoring changes. (2 pts)
 - [C] We review requirements when a question or issue comes up. (3 pts)
 - [D] We're not sure whether our current practices meet all applicable requirements. (4 pts)
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2. How do you stay informed about changes affecting IV therapy practices?

- [A] We actively monitor regulatory updates and industry developments through multiple reliable sources. (0 pts)
 - [B] We receive industry updates, but don't consistently review or act on them. (2 pts)
 - [C] We generally learn about changes through colleagues, social media, or word of mouth. (3 pts)
 - [D] We typically find out about changes only when they directly affect our business. (4 pts)
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3. Do you have a process for determining whether your services, protocols, and operations need to change when regulations change?

- [A] Yes. We have a defined process for reviewing and implementing changes. (0 pts)
 - [B] We review changes internally when they're brought to our attention. (2 pts)
 - [C] Changes are handled on a case-by-case basis. (3 pts)
 - [D] We don't currently have a formal process. (4 pts)
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4. How current are your state-specific compliance resources?

- [A] We maintain current state-specific resources and review them regularly. (0 pts)
 - [B] We have resources available, but we're not sure when they were last reviewed. (2 pts)
 - [C] We rely primarily on general industry information. (3 pts)
 - [D] We don't have a centralized source for state-specific requirements. (4 pts)
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5. If a regulatory or compliance question came up tomorrow, would you know where to turn?

- [A] Yes. We have established professional resources we can consult. (0 pts)
- [B] We have some resources, but would need to figure out who to contact. (2 pts)
- [C] We'd probably ask another provider or search online. (3 pts)
- [D] We don't currently have a reliable resource for these questions. (4 pts)

SECTION 2

POLICIES, FORMS & DOCUMENTATION

6. When was the last time you reviewed your patient forms and business policies?

- [A] Within the past year, with updates made as needed. (0 pts)
 - [B] Within the past 1–2 years. (2 pts)
 - [C] It's been several years. (3 pts)
 - [D] We don't have a regular review process. (4 pts)
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7. How confident are you that your patient documentation is complete and consistent?

- [A] Very confident. We have standardized documentation processes and regularly audit them. (0 pts)
 - [B] Generally confident, but we don't formally audit documentation. (2 pts)
 - [C] Documentation varies depending on the provider or situation. (3 pts)
 - [D] We know there are inconsistencies we need to address. (4 pts)
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8. Does your practice have written policies for situations such as cancellations, no-shows, patient communication, emergencies, and other common operational issues?

- [A] Yes. We maintain written policies and keep them current. (0 pts)
 - [B] We have most policies in place but may have a few gaps. (2 pts)
 - [C] Some policies are documented, while others are handled informally. (3 pts)
 - [D] Most policies are communicated verbally or handled case-by-case. (4 pts)
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9. How are your employees and contractors trained on your practice's policies and procedures?

- [A] We have structured onboarding, training, and documentation for required policies. (0 pts)
 - [B] We provide training but don't consistently document it. (2 pts)
 - [C] Training is primarily informal or shadow-based. (3 pts)
 - [D] There is no consistent training process. (4 pts)
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10. If your practice were asked tomorrow to produce its key policies, forms, and operational documents, how quickly could you do it?

- [A] Immediately. Everything is organized and easily accessible. (0 pts)
- [B] Within a few hours. We know where everything is, but it's not perfectly organized. (2 pts)
- [C] It would take some time to gather everything. (3 pts)
- [D] We're not sure that all of our documentation is complete. (4 pts)

SECTION 3

PATIENT SAFETY & OPERATIONS

11. Does your practice have standardized protocols for patient assessment before IV therapy?

- [A]** Yes. We use consistent protocols and documentation for every appropriate patient. (0 pts)
 - [B]** We have protocols, but implementation varies between providers. (2 pts)
 - [C]** Providers generally use their own clinical judgment without a standardized process. (3 pts)
 - [D]** We do not currently have standardized protocols. (4 pts)
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12. How does your team prepare for potential adverse events or emergencies?

- [A]** We have written emergency protocols, required supplies, and regular staff training. (0 pts)
 - [B]** We have emergency procedures and supplies, but training isn't consistently refreshed. (2 pts)
 - [C]** We have basic emergency supplies but limited formal protocols or training. (3 pts)
 - [D]** Emergency preparedness is primarily dependent on individual provider experience. (4 pts)
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13. How consistently does your team follow the same operational and safety procedures?

- [A]** Very consistently. Procedures are standardized, documented, and reinforced. (0 pts)
 - [B]** Mostly consistently, with occasional variations. (2 pts)
 - [C]** Procedures vary depending on the provider or location. (3 pts)
 - [D]** We don't have a standardized operating process across the practice. (4 pts)
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14. When was the last time your team reviewed its safety procedures?

- [A]** Within the past year, with updates made as needed. (0 pts)
 - [B]** Within the past 1–2 years. (2 pts)
 - [C]** More than two years ago. (3 pts)
 - [D]** We don't have a formal review schedule. (4 pts)
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15. How do you handle incidents, near misses, patient complaints, or operational problems?

- [A]** We document them, review what happened, and use the information to improve our processes. (0 pts)
- [B]** We document significant issues but don't have a formal review process. (2 pts)
- [C]** Issues are generally handled by the provider or manager involved. (3 pts)
- [D]** We don't have a consistent process for documenting or reviewing these events. (4 pts)

SECTION 4

BUSINESS & FINANCIAL HEALTH

16. Do you know your practice's key financial numbers?

- [A] Yes. We regularly track revenue, expenses, margins, and other important KPIs. (0 pts)
 - [B] We track revenue and expenses, but not many other KPIs. (2 pts)
 - [C] We primarily look at our bank balance and overall revenue. (3 pts)
 - [D] We don't have a consistent system for tracking business performance. (4 pts)
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17. Do you know which services, treatments, or offerings are most profitable for your business?

- [A] Yes. We regularly evaluate profitability by service or offering. (0 pts)
 - [B] We have a general idea but haven't formally analyzed it. (2 pts)
 - [C] We primarily focus on what sells most frequently. (3 pts)
 - [D] We don't currently track profitability by service. (4 pts)
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18. How often do you review your operating expenses and vendor costs?

- [A] Regularly. We compare costs, negotiate when appropriate, and look for efficiencies. (0 pts)
 - [B] Occasionally, usually when costs increase. (2 pts)
 - [C] We generally keep the same vendors unless there's a problem. (3 pts)
 - [D] We don't regularly review vendor or operating costs. (4 pts)
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19. Does your business have a defined plan for growth?

- [A] Yes. We have specific goals, KPIs, and a plan for achieving them. (0 pts)
 - [B] We have growth goals but our plan is still developing. (2 pts)
 - [C] We generally focus on growing month-to-month. (3 pts)
 - [D] We don't currently have a formal growth strategy. (4 pts)
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20. How prepared is your business to handle an unexpected disruption?

- [A] We have financial reserves, contingency plans, and documented processes. (0 pts)
- [B] We have some contingency planning, but there are gaps. (2 pts)
- [C] We would figure things out as they happened. (3 pts)
- [D] A significant disruption could seriously impact our ability to operate. (4 pts)

SECTION 5

MARKETING, GROWTH & PATIENT RETENTION

21. How consistently are you marketing your IV hydration business?

- [A] We have a defined marketing strategy and consistently execute it. (0 pts)
 - [B] We market regularly, but our approach isn't always consistent. (2 pts)
 - [C] We market primarily when business slows down. (3 pts)
 - [D] Most of our growth comes from word-of-mouth or referrals. (4 pts)
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22. Do you know where your new patients are coming from?

- [A] Yes. We track lead sources and regularly evaluate which channels perform best. (0 pts)
 - [B] We have a general idea but don't consistently track it. (2 pts)
 - [C] We ask patients occasionally, but don't formally track the data. (3 pts)
 - [D] We don't know which marketing channels are generating our patients. (4 pts)
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23. What happens after a patient's first visit?

- [A] We have a defined follow-up and retention strategy designed to encourage future visits. (0 pts)
 - [B] We follow up with some patients but don't have a standardized process. (2 pts)
 - [C] We primarily wait for patients to schedule again. (3 pts)
 - [D] We don't have a formal patient retention strategy. (4 pts)
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24. How effectively does your practice use reviews, referrals, memberships, packages, or other retention tools?

- [A] We have multiple strategies in place and actively measure their performance. (0 pts)
 - [B] We use some of these strategies but could be more consistent. (2 pts)
 - [C] We rely primarily on referrals and repeat business organically. (3 pts)
 - [D] We don't currently have a structured retention or referral strategy. (4 pts)
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25. How confident are you that your business is positioned for the next stage of the IV hydration industry?

- [A] Very confident. We're actively educating ourselves, networking, adapting, and planning ahead. (0 pts)
- [B] Confident, but there are areas where we need additional knowledge or resources. (2 pts)
- [C] We're focused primarily on today's operations and haven't spent much time planning ahead. (3 pts)
- [D] We're concerned that we may be falling behind changes in the industry. (4 pts)

STEP 2: CALCULATE YOUR TOTAL SCORE

Add your points from Questions 1-25.

YOUR TOTAL SCORE: _____ / 100

The scoring system intentionally rewards businesses that have stronger systems, documentation, education, and proactive processes.

WHAT DOES YOUR SCORE MEAN?

0-24 POINTS — STRONG FOUNDATION

Your business has many of the fundamentals in place. You appear to have established systems and processes across several important areas of your practice. But a healthy business isn't a finished business. Regulations change. Best practices evolve. New vendors, technologies, educational opportunities, and business challenges continue to emerge.

Your next opportunity: Stay informed, strengthen your existing systems, and continue investing in the long-term sustainability of your practice.

25-49 POINTS — OPPORTUNITY TO STRENGTHEN

Your business is operating—but there are identifiable gaps. You likely have many of the pieces in place, but some areas may depend too heavily on individual knowledge, informal processes, or outdated resources. These gaps may not create problems today, but they can become more significant as your practice grows.

Your next opportunity: Identify your lowest-scoring sections and prioritize the systems, education, and resources that can strengthen them.

50-74 POINTS — NEEDS ATTENTION

Your assessment identified several areas where your business could benefit from additional support. Your practice may be relying on reactive problem-solving rather than standardized systems and proactive planning. As your business grows, these gaps can become harder to manage.

Your next opportunity: Build a stronger foundation around compliance, documentation, safety, financial management, and growth before those gaps become bigger challenges.

75-100 POINTS — PRIORITY ACTION REQUIRED

Your assessment suggests significant opportunities to strengthen your business infrastructure. Several important areas may currently depend on informal processes, limited resources, or individual knowledge. That doesn't mean your business is failing. It means there is an opportunity to build a stronger business before the demands of growth make those gaps harder to address.

Your next opportunity: Start with the areas where you scored highest and seek the education, resources, professional guidance, and industry support necessary to strengthen your practice.

YOUR SCORE ISN'T THE END.

IT'S YOUR STARTING POINT.

Where do you go from here?

You don't have to figure it out alone.

The **American IV Association (AIVA)** exists to help IV hydration professionals stay informed, compliant, connected, and positioned for long-term success.

Membership gives operators access to a growing ecosystem of education, regulatory resources, business tools, professional networks, vetted vendors, and member benefits designed specifically around the needs of the IV hydration industry.

YOUR AIVA MEMBERSHIP CAN HELP YOU BUILD WHAT'S NEXT



STAY INFORMED

Get access to industry news, educational content, webinars, events, and ongoing updates designed to help you stay current as the IV therapy industry evolves.



STRENGTHEN YOUR BUSINESS

Access business resources, templates, forms, and operational tools designed specifically for IV hydration practices. AIVA currently offers a growing library of member forms and resources, with forms included as a membership benefit.



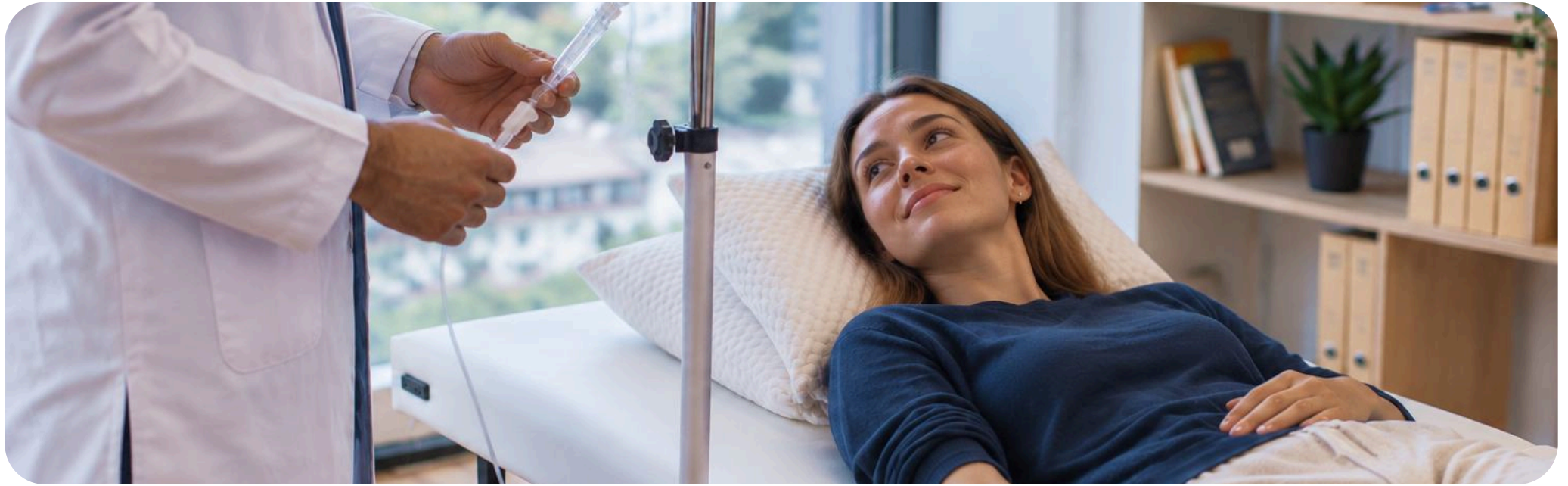
NAVIGATE REGULATORY CHANGE

Access state-specific regulatory resources and AIVA's legal network to help you better understand the issues affecting IV therapy businesses. Members also receive access to a complimentary 30-minute legal consultation through AIVA's network.



INVEST IN EDUCATION

Continue developing your team's knowledge through AIVA's training, webinars, events, and preferred educational resources. AIVA highlights IV therapy training focused on patient care, safety, fluid balance, and nutrient science.



CONNECT WITH THE INDUSTRY

Build relationships with other IV professionals through AIVA events, networking opportunities, workshops, online discussions, and the broader AIVA community.



ACCESS VETTED VENDORS

Explore AIVA's network of vetted vendors and access potential member discounts and group purchasing opportunities designed to help practices find reliable business solutions.



PLAN FOR GROWTH

From business resources and professional development to the Career Center, purchasing opportunities, education, and networking, AIVA gives members tools designed to support both today's operations and tomorrow's growth.

**YOUR SCORE TELLS YOU WHERE TO LOOK.
AIVA HELPS YOU KNOW WHERE TO GO.**

Don't wait until you have a problem to find the resources you need.

Join a community built specifically for the professionals operating and growing IV hydration businesses.

JOIN AMERICAN IV ASSOCIATION

Stay Informed. Stay Compliant. Stay Connected.

JOIN AIVA TODAY



THE IV HYDRATION BUSINESS HEALTH CHECK

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