PERSONAL TRAINING CLIENT TRACKING POLICIES AND PROCEDURES

Purpose: These policies and procedures are used to keep a consistent protocol with the Personal Training position to accurately document client attendance and package usage.

Scope: These policies and procedures are used by Fitness & Wellness Personal Trainers.

Policies:

I) PERSONAL TRAINING CLIENT TRACKING POLICIES

a) All client sessions must be documented in both Fusion and the Google spreadsheet.
   i) In the event Fusion malfunctions, the Google spreadsheet is used as a back-up verification of sessions used.
   ii) The trainer must record all of their sessions under their client list and under the pay period document no later than 9am on the first Wednesday of the pay period. (Edits should be made promptly to ensure accurate reporting and approvals).
b) Personal Trainers must keep verification of each package the client has used up.
c) Personal Trainers also use the Google spreadsheet to indicate when they are available to take new clients (highlight their name green) and when they are not available to take new clients (red).
   i) It is the responsibility of the trainer to promptly change their status when they are no longer able to accept more clients.
   ii) Personal Trainers must indicate their availability in the Google spreadsheet.

Procedures:

I) PERSONAL TRAINING CLIENT TRACKING PROCEDURE

a) Once logged into the Fitness & Wellness google account, the trainer will click on the drive icon to access the Personal Training tracking spreadsheet.

b) The trainer will type their name in a cell on the spreadsheet and highlight their name green to indicate they are able to train clients.

c) Underneath the trainer's name, he or she will list any active clients. Based on the amount of sessions purchased, the trainers will document the number of sessions allotted for the client by creating a column for each purchased session and highlighting the cell yellow that signifies the last purchased session

d) Once the client completes a session, the trainer will type the date of the completed session in the cell to the right of the client's name until they reach the yellow highlighted cell. Once this cell has been filled with a completed session, the client must purchase additional sessions to continue.

   i) It is the responsibility of the Personal Trainer to notify the client when their purchased package has ended, and to encourage them to purchase another package.

   ii) The Personal Trainer should also notify the Personal Training Program Assistant when a package of sessions has been finalized with a client to ensure a follow up satisfaction survey can be sent.