

## PERSONAL TRAINING NEW CLIENT INFORMATION POLICIES AND PROCEDURES

**Purpose:** These policies and procedures are used to keep a consistent protocol with the Personal Training position to accurately document new clients.

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

### **Policies:**

- I) PERSONAL TRAINING NEW CLIENT POLICIES
  - a) The trainer must contact the prospective client via e-mail within 24 hours to set up the initial fitness assessment.
  - b) Cancellations must be given 24-hours in advance or the session MAY be forfeited and charged for the session.
    - i) This is at the discretion of the trainer.
  - c) All new clients purchasing more than one session are required to purchase the Initial Fitness Assessment separately from their training sessions.
  - d) All trainers should understand each element of the fitness assessment procedure and FMS protocol. The trainer should also understand and be able to explain the classifications for each assessment.
    - i) All trainers should be able to perform the fitness assessment without the assessment computer program should there be any technical difficulties with the equipment
  - e) Personal Trainer must have all of the following paperwork on file for the client:
    - i) Personal training packet
    - ii) Physician's referral (if applicable)
  - f) If a physician's referral form is needed, explain to the client why this form is necessary. The fitness assessment will need to be rescheduled, however you may use this time for discussion of goals.
    - i) Clients can either take the physician's referral to their doctor and bring it back to their next scheduled session or the physician may fax it back to Rec Sports (fax info is located at bottom of sheet).
    - ii) No training or assessment may occur until the form has been returned.
  - g) Once the fitness assessment is complete all appointments can be scheduled. All sessions must be recorded on Google spreadsheet and in When to Work by the personal training program assistant.

### **Procedures:**

- I) PERSONAL TRAINING NEW CLIENT PROCEDURE
  - a) An initial fitness assessment must be conducted prior to any personal training session.
  - b) Fitness assessments last 1.5 hours in duration. If someone has signed up to train with a buddy, they must complete their assessments at different times.
    - i) The protocol sheets are located in the Personal Training office for referral during an assessment.

- c) Once the initial assessment is complete, get a blank folder in the PT Office and create a folder for the new client. All documentation will be placed in this folder.
  - i) These documents include, but are not limited to, personal training client information sheet, physician's referral (if applicable), fitness assessment results and program sheets for each session.