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 session/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 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 MicroFit assessment software should there be any technical difficulties.
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   d) Personal Trainers must have all the following paperwork on file for the client:
      i) Personal training packet
      ii) Physician's referral (if applicable)
      iii) Previous fitness assessment results

   e) If a physician's referral form is needed and you have already scheduled a session, Personal Trainers should 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.

   f) Once the fitness assessment is complete all appointments can be scheduled. All sessions must be recorded on Microsoft Excel tracking spreadsheet and in When to Work by the personal training program assistant.
   g) Personal Trainers are not permitted to take clients with them after leaving employment with Rec Sports due to graduation, termination, or resignation.
   h) Personal Trainers should transfer clients to other Rec Sports trainers when leaving their position for any reason. The client file should be provided to the new trainer and placed in the new trainer's file.
   i) All client information should be kept confidential. Professional conduct is always required of Personal trainers.

Procedures:

I) PERSONAL TRAINING NEW CLIENT PROCEDURE

a) An initial fitness assessment must be conducted prior to any package of personal training sessions.
   i) Assessment protocol sheets are posted in the Personal Training office for referral during an assessment.
b) Once the initial assessment is complete, a manilla folder for the new client should be created. ALL CLIENT 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, program sheets for each session, or any additional useful information for another personal trainer. **It is imperative that trainers keep track of progress and information about the client.**
   ii) The personal trainer should place all active client folders in their file. Inactive client folders should be placed in the inactive fling cabinet.