Introduction ........................................................................................................................................ 2

Identify general client fitness requirements ..................................................................................... 3

1. Identify general client fitness requirements .................................................................................. 3
2. Identify and assess client requirements and expectations according to organisational policies and procedures .................................................................................................................................. 4
3. Explain available services and facilities relevant to the client’s requirements and expectations .................................................................................................................................. 5
4. Greet the client in a friendly and courteous manner ........................................................................ 6

Advise client on the benefits of fitness appraisal and exercise prescription ....................................... 7

1. Explain the benefits of fitness activities relevant to the needs of the client .................................. 7
2. Advise the client of the benefits of fitness appraisals and prescribed exercise programs............. 9
3. Advise the client on specific fitness activities to meet identified needs .................................... 9

Administer and process a health screening questionnaire ................................................................... 11

1. Briefly explain the purpose of a pre-exercise health screening questionnaire to the client ......... 11
2. Provide and administer an industry standard health screening questionnaire to the client according to organisational policies and procedures ......................................................... 12
3. Review the questionnaire in consultation with the client and clarify screening provided as required .......................................................................................................................... 17
4. Refer the client to appropriate personnel for further appraisal as required ............................. 20
5. Provide information to the client on the elected exercise program ............................................ 23
6. Process or file the screening questionnaire according to organisational policies and procedures ................................................................................................................................. 24
INTRODUCTION

When a new client arrives at a fitness facility for the first time they are required to go through a fitness orientation and health screening process. This is to ensure that the fitness facilities are adequate for the client’s needs and that the client is fit to use the facility. Every fitness facility will have their own specific procedures on how this is carried out, however, we will be referring to some example procedures to give you some insight to the practical application of this. This orientation and screening process has many different purposes, including:

- To find out exactly what a client is looking for in a fitness facility,
- To fulfill the business’s duty of care to ensure that the person is in fact healthy enough to begin an exercise program, and
- To build rapport with the client to upsell products and services.

In order to provide a client with an effective fitness orientation and health screening, you will need to ensure you can:

- Identify general client fitness requirements,
- Advise client on the benefits of fitness appraisal and exercise prescription, and
- Administer and process a health screening questionnaire.
IDENTIFY GENERAL CLIENT FITNESS REQUIREMENTS

Before a client signs up to a membership at a fitness facility, agrees to undertake Personal Training at a studio, or participates in an outdoor exercise session, they are going to want to know that their needs and expectations are going to be met. Therefore, they are going to want a fitness orientation, or a tour of the facilities to understand the look and feel of the environment. During this time, it will be your responsibility to:

- Identify the client’s fitness requirements,
- Identify and assess the client’s requirements and expectations,
- Explain available services and facilities relevant to the client’s requirements and expectations, and
- Greet the client in a friendly and courteous manner.

1.1 Identify general client fitness requirements

Working in the Fitness Industry, you are going to come across people from all different walks of life. Clients are going to be:

- Experienced or inexperienced,
- Children, adolescents, or older clients (and everything in between),
- Active or inactive,
- Health or have medical conditions,
- From different socio-economic backgrounds, and
- From different cultural backgrounds.

Because of the diversity in clients that you are going to have to deal with, you will need to have some knowledge about each of these different types of people and their general fitness needs. For example, older adults are generally interested in functional movement that is gentle and will help them with their everyday tasks, adolescent males usually want to lift weights, and stay at home mum’s often like group exercise classes as they add the social element into their training. As you gain more experience in the fitness industry you will start to recognize patterns in client’s fitness requirements.

This does not mean that you will assume you know everything about a person because of their age, gender and lifestyle, however, it will help you to ask the right questions to extract the right information. In the first subject, Basic Fitness Industry Skills, we talked at length about being client focused and asking open ended questions to extract tangible information from a person.

These skills are very important during the Fitness Orientation because you are required to find out what the client is looking for and then give them some information about the products and services that your workplace offers that will met their needs and expectations.
For example, if you greeted a perspective client and they told you that they were a university student and didn’t have a lot of money, then you wouldn’t talk to them at length about Personal Training or supplements. You would, however, talk to them about the ‘entry level’ gym memberships and the services that are included.

Likewise, if you were taking an older lady who has told you she wants to use the cardio equipment and do some yoga and Pilates classes through a Fitness Orientation you would focus your time and energy on these products and services and less times on the weights rooms or child care facilities.

1.2 IDENTIFY AND ASSESS CLIENT REQUIREMENTS AND EXPECTATIONS ACCORDING TO ORGANISATIONAL POLICIES AND PROCEDURES

During the Fitness Orientation you will need to extract some very specific information out of the perspective client about their requirements and expectations. These may include information about their:

- Fitness goals,
- Specific exercise preferences,
- Expected outcomes, and
- Perceived benefits.

Once you have this information you can provide the person with solutions to their fitness requirements, including:

- Costs,
- Time availability,
- Scheduling, and
- Range of facilities and equipment

In doing so, you will need to follow the organisational policies and procedures of the workplace in which you are employed.

*Click here to access an example Fitness Orientation Procedure*
1.3 EXPLAIN AVAILABLE SERVICES AND FACILITIES RELEVANT TO THE CLIENT’S REQUIREMENTS AND EXPECTATIONS

Now that you have a general understanding about the needs and expectations of the perspective client, you can give them a tour and discuss the relevant information in more depth. Ensure you focus on the things that are going to be most appropriate to them.

General information about the services and facilities that the Fitness Centre has to offer may include:

- **Group Exercise Classes**
  - The different types,
  - Days and times, and
  - A little bit about the instructors.

- **One on one Training**
  - Session lengths,
  - Benefits,
  - When Personal Trainers are available, and
  - A little bit about the Personal Trainers

- **Healthy Eating / Lifestyle Information:**
  - Any seminars or programs the centre has running
  - Length of time,
  - Benefits,
  - Frequency,
  - A little bit about the presenters

- **Fitness Equipment**
  - Cardio, resistance (machines), innovative equipment and stretch areas
  - Different types of equipment available, and
  - The benefits of the different types of equipment,

- **Facilities**
  - Bathrooms, saunas, spas, hair dryers etc
  - Child minding facilities,
  - Massage, physiotherapist and any other allied health professionals that are available on site,
  - Supplements and refreshments available onsite

- **Memberships**
  - Types of memberships,
  - Length or memberships,
  - Cost,
  - Terms and conditions, and
Joining fees.

Remember to keep the conversation going by asking open-ended questions to find out as much as the person as possible.

### 1.4 GREET THE CLIENT IN A FRIENDLY AND COURTEOUS MANNER

To summarise, here is a list of Dos and DON’Ts when it comes to greeting a client in a friendly and courteous manner.

<table>
<thead>
<tr>
<th>DOs</th>
<th>DON’Ts</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Stand up,</td>
<td>• Remain seated behind the reception desk,</td>
</tr>
<tr>
<td>• Come out from behind the reception counter,</td>
<td>• Ignore the person walking in the front door, hoping that someone else will address them,</td>
</tr>
<tr>
<td>• Walk towards them with your hand outstretched,</td>
<td>• Pretend to be busy on your phone,</td>
</tr>
<tr>
<td>• Shake their hand,</td>
<td>• Wait for the person to come to or speak to you first.</td>
</tr>
<tr>
<td>• Introduce yourself,</td>
<td></td>
</tr>
<tr>
<td>• Ask them how you can help them,</td>
<td></td>
</tr>
<tr>
<td>• Ask them their name,</td>
<td></td>
</tr>
<tr>
<td>• Smile,</td>
<td></td>
</tr>
<tr>
<td>• Act like you are interested in helping them.</td>
<td></td>
</tr>
</tbody>
</table>

The application of this can be found in the example *Fitness Orientation Procedure*. 
ADVISE CLIENT ON THE BENEFITS OF FITNESS APPRAISAL AND EXERCISE PRESCRIPTION

Now that you have taken the perspective client on a fitness orientation / tour of the fitness facility, given them the price presentation and they are keen to become a member, you need to advise them about the benefits of fitness appraisals and exercise prescription. To understand where this fits into the induction of a new client refer to the ‘New Client Procedure’.

Click here to go to an example New Client Procedure.

This conversation would normally take place either during or after the client has signed up as a member of the fitness facility and you need to ensure that you cover:

- An explanation or summary of the benefits of fitness activities relevant to the needs of the client
- An explanation of the benefits of a fitness appraisal and exercise programs
- An explanation on specific fitness activities to meet identified needs

2.1 EXPLAIN THE BENEFITS OF FITNESS ACTIVITIES RELEVANT TO THE NEEDS OF THE CLIENT

In order to get a client to commit to an exercise program you need to get them to develop an emotional connection with their training. People who are more emotionally connected to a person, activity or service are more likely to stay with it for a long time. The best way to help a client become emotionally connected is to outline all the benefits of the product or service that they are interested in. Some general benefits of all types of exercise include:

- General fitness and wellbeing
- Ability to better deal with stress
- More stable moods
- Better overall mental health
- Better sleeping patterns
- More control of body weight
- Increased energy and stamina
- Increases kilojoule expenditure

Each different type of physical activity also has specific benefits. Below are some common fitness services and activities found in fitness centres and the benefits of each:

- Resistance Training
  - Increased strength
  - Increased tone
  - Increased bone density
  - Improved posture
Enhanced performance of everyday tasks ie carrying groceries and other heavy loads

- **Cardiovascular Training**
  - Lowers blood pressure
  - Increases HDL cholesterol
  - Decreases total cholesterol
  - Increase heart function
  - Decreases resting heart rate
  - Increases aerobic capacity

- **Stretching**
  - Increases range of movement at a joint
  - Enhances muscular coordination
  - Increases blood flow (circulation) around the body
  - Decreases risk of injury

- **Yoga / Balance Classes**
  - Increases range of movement at a joint
  - Enhances muscular coordination
  - Increases blood flow (circulation) around the body
  - Decreases risk of injury
  - Increases flexibility
  - Increases coordination
  - Increases balance
  - Increases ability to relax

- **Pilates**
  - Increase posture and core strength
  - Increases flexibility
  - Decreases muscle imbalances
  - Decreases risk of injury
  - Increases lung capacity from deep breathing
  - Increases blood flow / circulation
  - Increases balance
  - Increases coordination
  - Increases muscular strength in shoulder and pelvis stabilizing muscles

- **Spin Classes**
  - Increases muscle tone in legs
  - Increases cardiovascular endurance
  - Increases muscular endurance in the legs

- **Boxing Classes**
  - Increases cardiovascular endurance
  - Increases muscular endurance
  - Increases coordination
  - Increases balance
  - Increases social interaction

- **Aerobics / Step Classes**
2.2 ADVISE THE CLIENT OF THE BENEFITS OF FITNESS APPRAISALS AND PRESCRIBED EXERCISE PROGRAMS

Many people start an exercise program with no real direction. They join a gym or a fitness centre and just try to do 30 – 45 minutes of moderate exercise on all or most days of the week. While this is a good approach for basic health related results, it is unlikely they will ever achieve specific weight or fitness goals. As a result, it is important to discuss the benefits of fitness appraisals and prescribed exercise programs with all clients, in the hope that they will all choose to access these services. These benefits include:

Benefits of fitness appraisals:

- To see where the client is at,
- To gather important information about the clients health status,
- To get an idea of the starting point, and
- To ensure their goals match their actual requirements.

Benefits of prescribed exercise programs:

- To have structured training programs,
- To have a plan that is aligned with the client’s goals,
- To keep the client accountable,
- To ensure the Fitness Professional and client are on the same page, and
- To achieve a known outcome.

2.3 ADVISE THE CLIENT ON SPECIFIC FITNESS ACTIVITIES TO MEET IDENTIFIED NEEDS

Some clients don’t know exactly what it is that they want to achieve from starting a fitness program or regime and therefore they will look to you for some guidance on this matter. When you ask the question: “What do you want to achieve from starting an exercise program?” some common responses from clients include:

- I want to bulk up
- I want to lose weight
- I want to get fit
I want to tone up
I want to get stronger

These are very general goals, therefore, upon meeting a client for the first time you need to be very quick at identifying the client’s needs and expectations and advising them on specific fitness activities. Because you have limited time during the Fitness Orientation to identify their needs and they only give you a generalized response, you can only be expected to respond with a generalized responses.

For example, you are taking a client on a tour of the fitness facility and they mention that they like to do stretching and relaxation after a weights session you may respond with: “You can use the weights room to do your own resistance training and then jump into a yoga or Pilates to stretch out those fatigued muscles. Alternatively, you may be interested in using our designated stretch room”.


ADMINISTER AND PROCESS A HEALTH SCREENING QUESTIONNAIRE

3.1 BRIEFLY EXPLAIN THE PURPOSE OF A PRE-EXERCISE HEALTH SCREENING QUESTIONNAIRE TO THE CLIENT

Most people these days are used to filling out health screening forms when they see a physiotherapist, massage therapist, and even the beautician. However, every now and then you will come across someone who has never had to do it before. As a result, it is good practice to get in the habit of always explaining the purpose of a pre-exercise health screening questionnaire to a client when requesting that they do so. Generally, if people understand the reason why they need to do something, they are much more willing to oblige.

From a business perspective, the pre-exercise health screening questionnaire serves many different purposes, including:

- To gather personal and contact information about the client for future contact and marketing,
- To gather medical information from the client to ensure that they are ready to start an exercise program,
- To gather current exercise and nutrition information from the client get an idea of their starting point, and
- To get an understanding about what the client wants to achieve in order to prescribe the most suitable fitness program.

When asking a client to fill out a pre-exercise health screening questionnaire you may like to say something like:

“I will get you to fill out this 2 page questionnaire so that we can get an idea of your current health status, you current exercise habits and your goals so that we can tailor your experience here to maximize your results”
3.2 PROVIDE AND ADMINISTER AN INDUSTRY STANDARD HEALTH SCREENING QUESTIONNAIRE TO THE CLIENT ACCORDING TO ORGANISATIONAL POLICIES AND PROCEDURES

Like all work processes, each fitness facility will have their own way of providing and administering an industry standard health screening questionnaire to their clients. Likewise, each fitness facility will have their own pre-exercise health screening form.

An industry standard pre-exercise health screening questionnaire needs to ask questions regarding:

- Personal details,
- Medical conditions,
- Prescribed medications,
- Lifestyle factors,
- Exercise history, and
- Nutrition

**Personal Details**

It is important to collect personal details of the perspective client. These details should include:

- Full name
- Address
- Email
- Contact numbers
- Date of Birth
- Next of kin name and contact details

These details are important for:

- Customer service practices i.e. to send out renewal notifications, newsletters etc
- Future marketing campaigns
- In case of an emergency whilst the client is at the fitness facility
- For financial contact in the case of bad debt

**Medical Conditions, Prescribed Medications and Existing Injuries**

A health screening questionnaire needs to include questions that identify if a client has a pre-existing medical condition. The common conditions that most fitness facilities will screen for are:

<table>
<thead>
<tr>
<th>Condition</th>
<th>Condition</th>
<th>Condition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stroke</td>
<td>Gout</td>
<td>Stomach ulcers</td>
</tr>
<tr>
<td>High blood pressure</td>
<td>Osteoarthritis</td>
<td>High cholesterol</td>
</tr>
<tr>
<td>Low blood pressure</td>
<td>Osteoporosis</td>
<td>Chron’s disease</td>
</tr>
</tbody>
</table>
Asthma  |  Chest pain  |  Irritable bowel syndrome
Epilepsy  |  Irregular heart beat  |  Gastrointestinal disease
Glandular fever  |  Muscular pain  |  Diabetes
Rheumatic fever  |  Joint pain  |  Hernia

These conditions can have adverse effects on a person during exercise and as a Fitness Professional it is your role to ensure all clients are safe during their time at the fitness facility. If a client presents with one of the above medical conditions; and they are in pain; and the condition is not under control, they will be required to obtain a medical clearance prior to starting a fitness program.

Sometimes, a new client will have a condition that has not been diagnosed and therefore remains untreated. As a result, it is important to be able to recognise some risk factors to potential harmful medical conditions. More specifically, a health screening questionnaire must contain questions that help to identify risk factors to cardiovascular disease. These questions should include the following:

- Name, age, and gender- are you a male ≥45 years old, or a female ≥55 years old?
- Has anyone in your family suffer heart attack, stroke, high cholesterol or died under the age of 65?
- Are you on medication, given birth last six weeks, C section last 12 weeks, been hospitalised, pregnant or have any infectious disease?
- Do you have high blood pressure, heart problems, metabolic disease, glandular fever, rheumatic fever, ulcer or hernia etc?

If someone does present to you with more than two (2) of these risk factors a medical clearance is required prior to beginning a fitness program.

Often medications can have adverse effects on the body during exercise. If a client is taking medication then it is important the fitness facility knows about this in case of an emergency and in order for a suitable and specific program to be written for the client. Taking medication is not a reason to exclude someone from exercise.

It is also important to screen a client for existing injuries. A client can exercise with a managed injury however they may require you to adapt their program accordingly. All undiagnosed or untreated injuries need a medical clearance prior to the client beginning an exercise program.

**Current Fitness Levels, Functional Limitations and Lifestyle**

Prior to a client starting a new fitness program it is important that you have a full understanding of the client’ current fitness levels, lifestyle factors and functional limitations.

In order to give the client a program that is suited to their specific needs it is important that you know what their current and past training program looks like. Therefore, you need to know the **FREQUENCY** (how often they are training), the **INTENSITY** (how hard they are training), the **TIME** (how long each training session is), and what **TYPE** of exercise they are currently doing.
A client’s lifestyle can play a big role in their adherence to exercise and therefore the achievement of their fitness goals. During the screening process you will need to gather information about the client’s work, family and social commitments. You will also need to understand their smoking and drinking habits.

Finally, you will need to understand the client’s functional limitations, that is, what they can and can’t or will or won’t do.

**Nutrition**

Gastrointestinal disorders are becoming more and more common in our society. It is believed that 1 in 3 people will suffer from a gastrointestinal disorder in their lifetime. These disorders range in severity and can include:

- Gastrointestinal reflux,
- Ulcers,
- Irritable bowel syndrome,
- Coeliac disease,
- Lactose intolerance, and
- Chron’s disease.

**Gastrointestinal Reflux**

Gastrointestinal reflux is also called Gastroesophageal Reflux Disease or GERD. GERD is a condition that involves the damaged done from stomach acid coming back up the oesophagus from the stomach. This generally occurs from a failure of the lower oesophageal sphincter. GERD is caused by obesity, the use of some medications and as a result of other gastrointestinal diseases or conditions.

**Stomach Ulcers**

Stomach ulcers are a break in the tissue or sores that occur in the lining of the oesophagus, stomach or small intestine. Stomach ulcers are cause from medications like aspirin and non-steroidal anti-inflammatory drugs (NSAIDS) and the bacteria, Helicobacter pylori.

**Irritable Bowel Syndrome**

Irritable Bowel Syndrome, IBS, or spastic colon is a syndrome that includes abdominal pain, discomfort, bloating and irregular bowel motions. While the causes remains unknown, it is thought that stress, change in routine infection and diet can bring on or trigger an attack. IBS does not have lasting effects nor does it contribute to more series or severe gastrointestinal conditions.

**Lactose Intolerance**

A lactose intolerance is an inability for the body to digest lactose, which is a sugar that is found in milk. This occurs due to a deficiency in the enzyme lactase. People who are lactose intolerant experience abdominal pain, bloating, flatulence and irregular bowel motions. Lactose intolerance is genetic.
**Chron’s Disease**

Chron’s disease is the inflammation of the bowel wall that causes abdominal pain, weight loss, irregular bowel motions, tiredness and vomiting. While the cause of Chron’s disease is still a mystery, it is thought that genetics, a defect in the body’s immune system and an infection by a bacteria or virus can contribute.

As a Fitness Professional it is important that you identify any of these conditions during the health screening process, before you provide any nutritional advice. If the condition is causing the client pain and discomfort, they need to be referred to a suitable qualified medical or allied health professional.

During the health screening process a person may not have a diagnosed medical condition but they may have unhealthy habits that potentially could lead to a medical condition down the track. Therefore, you are required to identify any healthy eating or dietary concerns. These may include, but are not limited to:

- Not eating regularly or skipping meals,
- Consuming dangerously low kilojoules,
- Consuming excessive cups of coffee or soft drink ie more than 3 cups a day,
- Using stimulants ie no doze, fat burners,
- Leaving out major food groups ie not eating meat but not supplementing protein, and
- Following fad diets.

Clients who present with these unhealthy lifestyle choices should be referred to a suitably qualified accredited practicing dietician or medical or allied health professional. In doing so, as a Fitness Professional, you are required to maintain client confidentiality at all times.

**Administering the Questionnaire**

When a client is filling out their pre-exercise health screening questionnaire it is recommended that you get them to sit in an environment that is comfortable and free of distraction. It is also recommended that the client is allowed to fill out the questionnaire on their own, therefore, try and avoid hovering around as this makes the client feel rushed and then they may not put as much thought into their responses. The period of time required for a client to fill out a pre-exercise health screening will vary from person to person, but will generally take 10 – 15 minutes.

*Click here to access the Adult Pre-Exercise Screening Tool*

*Click here to access an example Lifestyle Questionnaire*

*Click here to access a Health Screening Procedure*
3.3 REVIEW THE QUESTIONNAIRE IN CONSULTATION WITH THE CLIENT AND CLARIFY SCREENING PROVIDED AS REQUIRED

Once the client has filled out their pre-exercise health screening questionnaire, a Fitness Professional will need to go through that completed questionnaire in consultation with the client to clarify and ask further questions about the responses provided. This should take place in the form of a formal interview. There are many benefits of an interview, including:

- To develop rapport;
- To clarify any items that may be not understood;
- To gather further information from the client regarding their current situation;
- To demonstrate a professional and comprehensive approach; and
- To increases the likelihood that the client will be able to adhere to the program and achieve the desired goals.

During this consultation it is important for you to implement the strong communication and interpersonal skills covered in the “Basic Fitness Industry” subject. The purpose of this interview is to go through each of the questions that client answered on the questionnaire to gather as much information about the client as possible in order to prescribe the best form of training program.

During this process it is important for you to make the client feel comfortable and a part of the decision-making process. To achieve these desired goals you should:

- Be professional, polite and courteous,
- Listen and clarify the initial goals of the client,
- Review any previous information gained from initial health questionnaires or referrals, and
- Answer any questions the client may have.

The purpose and benefit of a health screening interview include:

- To ensure the client’s health is safe for them to begin fitness testing and undergo an exercise program,
- To identify any underlying medical conditions,
- To identify any contraindications of exercise,
- To identify any specific needs of the client,
- To meet legal requirements of the industry for exercise prescription,
- To gather information can that be used to develop exercise prescription, and
- To set a base line for comparison of subsequent changes in fitness or health.
SMART Goals

During the Health Screening Interview it is important that you encourage your new client to set some goals. Goals are important to overcome any barriers that the client may perceive exist in their life. Common barriers include work, time, family and sporting commitments, financial issues, geographic issues. If the client wants to achieve a result from their new training program then goal setting is essential. Goals can either be long term or short term.

Most people who are starting out on a new training program will have one (1) long term goal. These are goals that will take more than 3 months to achieve. For example, “I will feel proud if I could complete a short course triathlon in 12 months time” or “I would feel strong if I was able to bench press my body weight in 6 months time” or “I would have more confidence if I could lose 25kg in 11 months”

For many people, it is difficult to stay motivated and focused on a long term goal that may take 12 months to achieve. Therefore, it is important to set a number of short term goals or stepping stones along the way. Short term goals are generally goals that take less than 3 months to achieve and are much easier to stay focused on. For example; “I want to lose 5kgs in the next 8 weeks” or “I want to swim 1km without stopping in 5 weeks”.

Regardless of whether a goal is long or short term, when setting goals they must be SMART.

Specific

Every goal must be specific. Losing weight, toning up, swimming faster and lifting heavier are NOT examples of specific goals, however when you ask a client what they want to achieve these are the responses that they will often give you. A specific goal is “I want to lose 5 kg” or “I want to shoulder press 50kg” or “I want to run or swim 2km”. In all of these specific goals there is a specific end point.

Measureable

You need to be able to measure a goal; therefore, it needs an end point. You can measure kg, cm, kilojoules, km, km/h

Achievable

Goals need to be achievable. This is where your knowledge of the human body and its ability needs to be applied. A healthy weight loss occurs at 0.5 – 1 kg per week, lean muscle tissue growth can occur at about 0.5kg per week. You need to ensure that your client is not setting themselves up for failure.

Reason

The client needs to have a reason or an emotional connection to achieving the goal in order for the goal to be achieved. Try and get the client to reveal how they will feel when they achieve their goal.

Time

Goals must have a pre-determined end time. If a goal has no end date, how will you know when you have achieved it?
3.4 REFER THE CLIENT TO APPROPRIATE PERSONNEL FOR FURTHER APPRAISAL AS REQUIRED

As a fitness professional have legal limitations to your job role. You will be trained, qualified and insured to prescribe exercise to general population clients. General population clients are people who are

- Over the age of 18 years,
- Under the age of 55 years,
- Not pregnant or lactating,
- Free from injury,
- Free from chronic medical conditions, and
- Not part of a specific population group

Therefore, you have a duty of care when approached by clients who fall outside the ‘general population’ category, to either refer or seek assistance from another medical or allied health professional who is better trained and insured.

Risk Stratification

During the pre-exercise health screening process you will need to develop a risk stratification process. This is a decision making process that helps to identify which clients are suitable to start exercising and those who need to be referred.

Fitness Australia have been working in conjunction with Sports Medicine Australian and the Exercise and Sport Science Association (ESSA) to develop an Adult Pre-Exercise Screening Tool and User Guide.

Click here to access the ‘Adult Pre-Exercise Screening Tool’

Click here to access the ‘Adult Pre-Exercise Screening User Guide’

You may choose to implement this into your work practices as a Fitness Professional. Alternatively, the fitness facility may have their own risk stratification process.

Upon completion of the pre-exercise health screening questionnaire and interview you will need to make a decision about the new client’s readiness to exercise. Remember that sometimes people from the special population’s spectrum don’t know they have a condition, so it is our duty to find out if they do. Specific requirements/populations that may need medical clearance or specific fitness requirements may include:

- Clients with known diseases and conditions (e.g. Diabetes, Cancer, arthritis, cardiovascular disease)
- Moderate and High cardiac risk factors
- Genetic predisposition for particular diseases (e.g. diabetes, cardiovascular disease)
• Signs and symptoms of particular diseases (e.g. hypertension, heart palpitations as a sign of cardiovascular disease)
• Age of the client (young and elderly clients require specific programming and requirements when prescribing exercise)

The American College of Sports Medicine (ACSM) have created guidelines that propose a medical clearance be provided for males ≥45 years of age and females ≥55 years of age and/or for any client who is considered to be high risk. If a client has coronary risk factors, any known disorder or disease, symptoms of condition should also seek medical clearance before commencing exercise. Remember the following questions:

• Name, age, and gender- are you a male ≥45 years old, or a female ≥55 years old?
• Has anyone in your family suffer heart attack, stroke, high cholesterol or died under the age of 65?
• Are you on medication, given birth last six weeks, C section last 12 weeks, been hospitalised, pregnant or have any infectious disease?
• Do you have high blood pressure, heart problems, metabolic disease, glandular fever, rheumatic fever, ulcer or hernia etc?

If a client answers yes to two or more of the above questions then a medical certificate should be attain before fitness testing and exercise can be commenced. After a health assessment has been completed clients can be graded into three risk levels, they are;

<table>
<thead>
<tr>
<th>Risk Level</th>
<th>Conditions</th>
<th>Medical Clearance Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Low Risk</strong></td>
<td>Men under 45, women under 55, Clients who have no signs and symptoms, and have only one cardiac risk factor</td>
<td>No, can begin exercise immediately</td>
</tr>
<tr>
<td><strong>Moderate Risk</strong></td>
<td>Men ≥45, women ≥55, no signs or symptoms, have two or more coronary risk factors.</td>
<td>Yes, medical clearance needed</td>
</tr>
<tr>
<td><strong>High Risk</strong></td>
<td>One or more coronary signs or symptoms or known cardiovascular, pulmonary or metabolic disease.</td>
<td>Yes, medical clearance needed</td>
</tr>
<tr>
<td>Risk Factor</td>
<td>Defining Criteria</td>
<td></td>
</tr>
<tr>
<td>---------------------</td>
<td>-----------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Age</td>
<td>Men: ≥45 years, Women: ≥55 years</td>
<td></td>
</tr>
<tr>
<td>Family History</td>
<td>Sudden death before 55 years of age in father, or before 65 years of age in mother</td>
<td></td>
</tr>
<tr>
<td>Cigarette Smoking</td>
<td>Smoking within the last year</td>
<td></td>
</tr>
<tr>
<td>Hypertension</td>
<td>Blood pressure above 140/90 mmH</td>
<td></td>
</tr>
<tr>
<td>Diabetes Mellitus</td>
<td>People with insulin-dependent diabetes mellitus who are greater than 30 or have had IDDM for more than 15 years People with non-insulin dependent diabetes mellitus who are greater than 35 years old</td>
<td></td>
</tr>
<tr>
<td>Sedentary Lifestyle</td>
<td>Sedentary life style including work and home life</td>
<td></td>
</tr>
<tr>
<td>Hypercholesterolemia</td>
<td>Total Serum cholesterol &gt; (5.2mmol/L)</td>
<td></td>
</tr>
</tbody>
</table>

**Summary of Findings**

At the completion of the pre-exercise screening interview it is important to be able to summarise your findings and communicate these with your client. This summary should include:

- The positive aspects of the screening
- The aspects of the screening that need work
- Whether a medical clearance is required
- If their goals are relevant and achievable
- Information on the type of training program that would be suitable

From time to time you will come across a client who will need to get a medical clearance or a referral to an Allied Health Professional (AHP). Examples of AHPs are:

- sports medicine physician or staff specialist
- general practitioner
- physiotherapist
- accredited exercise physiologist
- occupational therapist
- remedial massage therapist
- chiropractor
- osteopath
- accredited practicing dietician
- psychologist
- aboriginal health worker
- diabetes educator

These clients will generally be identified during the screening process. A client needs to be referred to a General Practitioner or Allied Health Professional if they identify as a one of the following specific populations:

- Alzheimer’s Disease
- Arthritis
- Muscular Dystrophy
- Musculo-skeletal Pain
When you refer a client to get a medical clearance or for further treatment, you want to make the process as easy as possible for the client and you want to get the client to return to the fitness facility and to begin a fitness program.

There are many ways to refer a client and you will find that your fitness facility will already have a policy and procedure in place. It is suggested that you write a referral letter for your client to take along to their medical practitioner or allied health professional. Your letter needs to include:

- A company / business letter head
- The medical practitioner or allied health professional’s contact details (if known)
- The client’s name, address, gender, date of birth
- A detailed reason for the referral ie medical clearance, clinical test, or medical treatment

Click here to access an example ‘Referral Letter Template’

### 3.5 PROVIDE INFORMATION TO THE CLIENT ON THE ELECTED EXERCISE PROGRAM

Now that the client has filled out the pre-exercise health screening questionnaire and you have conducted your interview to clarify any doubtful points you will now have a better understanding of the client’s health status, current exercise habits and goals, you will be in a better position to be able to give more accurate advice about the clients new exercise program and be able to provide them with the relevant information. For example:

“John, from your questionnaire and our chat it is obvious to me that you have a lot of experience in the gym and you have already got your own training program that you are following and are happy with, therefore, welcome aboard and remember that if you do want your program updated then you can always just book in with a Personal Trainer”

“Christine, from your questionnaire and our chat, I believe that what would be best for you is to book in with a Personal Trainer, who will do some fitness testing with you, write you a program and show you how to implement that program”

“Fred, for your questionnaire and out chat, I understand that you want the routine of attending our group exercise classes at 5pm every evening. This will give you the routine and social interaction that you are looking for and because we have a different type of class on each day, it will give you a good range of strength, cardiovascular and flexibility training”
3.6 PROCESS OR FILE THE SCREENING QUESTIONNAIRE ACCORDING TO ORGANISATIONAL POLICIES AND PROCEDURES.

Once the pre-exercise health screening questionnaire has been completed, then it needs to be

- Screening of clients
- Referral requirements
- Fitness Orientation Procedure
- Records Management Procedure
- Privacy Police

All personal information about a client that is collected throughout the Fitness Orientation and Health Screening process needs to be stored and easily located for insurance and legal requirements. It is also important that any information or correspondence via email, written, verbal communication that is provided by the client is confidential between you and the client and appropriate staff of the facility. You need to be aware of all the organisational policies and procedures of your workplace and in this case the Privacy Act.