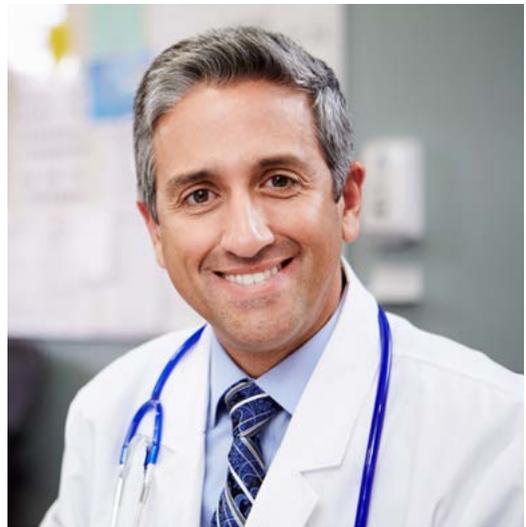


# Exercise Professionals' Action Guide

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Exercise  
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## How to Work with Health Care Providers: A Systematic Approach

This Exercise is Medicine® Action Guide provides exercise professionals with a blueprint for how to work effectively with physicians and other health care providers to use exercise and physical activity, in the correct “dosage,” as an effective patient care “prescription.” This guide supports one of the primary goals of the Exercise is Medicine initiative: to bring health care providers and exercise professionals together as part of the care continuum and ensure that exercise professionals are prepared to work safely and effectively with referred patients.

By using the resources listed below, you will be able to optimize your opportunities to build credibility and work with health care professionals in your community. These forms/resources can be found on the EIM website ([www.exerciseismedicine.org](http://www.exerciseismedicine.org)) on the Exercise Professionals page, and their use is referenced within this guide.

Due to potential variations in the law from one state to another, the documents provided in this guide should be reviewed and approved by legal counsel before they are used by you or your organization. ACSM makes no warranties or representations regarding the documents provided in this guide, and you or your organization assume all risk associated with any use of these documents.

### Sample Forms and Templates

1. [ACSM's Exercise Preparticipation Screening Questionnaire for Exercise Professionals](#)
  - This questionnaire should be used in conjunction with ACSM's screening algorithm from *ACSM's Guidelines for Exercise Testing and Prescription*.
2. [Health History Questionnaire](#)
3. [Sample Medical Clearance Form](#)
  - If you are going to reproduce this form for publication (written or electronic), please obtain permission first from the author.
4. [Fitness Assessment Data Sheet template](#)
  - Modify this template to reflect the assessments that you typically provide.
5. [Initial Fitness Assessment/Physical Activity Plan](#)
6. [Patient Fitness Progress Report](#)
7. [Informed Consent for Participation in a Health and Fitness Training Program](#)
8. [Cancellation Policy](#)
9. ACSM's Rx for Health series handout: Being Active for Better Health (this title and others that are specific to various medical conditions can be found at [www.exerciseismedicine.org](http://www.exerciseismedicine.org)).



## Step 1: Professional Preparation

Develop your knowledge, skills and abilities, and you'll be rewarded. You'll need a combination of formal education, recognized and respected certifications, and practical business skills.

- **Formal education:** Earning at least a bachelor's degree in an exercise science/wellness field is important when working with a physician or other health care provider. Physicians appreciate the value of a science-based college education; whereas they often don't understand the confusing landscape of fitness certifications. A college education improves your chances of becoming a valued member of the extended health care team. If you do not currently have a degree, do your best to attain one.
- **Credentials:** Become certified by an NCCA accredited or ISO/IEC 17024 fitness organization such as ACSM, NSCA, ACE or NASM. For a list of NCCA accredited certifications go to <http://www.credentialingexcellence.org/nccadirectory>. You will likely have to explain the value of NCCA certification by educating a provider that this is the same organization that certifies other respected health care professionals such as emergency medical technicians (EMT), registered dietitians (RD), respiratory therapists (CRT), and many nursing subspecialties. Possessing the ACSM **EIM Credential** can give you additional knowledge and credibility and may be required to facilitate EIM programming. Accredited certifications require that you possess a current certification in CPR/AED. This is critical for your client's protection as well as your own and will be expected by a referring health care provider.
- **Practical skills:** Expand your knowledge and skills through internships, seminars, conferences and varied employment settings. Find a mentor with expertise in your area of interest and create opportunities to work with them, even if it means volunteering your time. If you plan to work with a specific population, participate in hands-on continuing education to enhance your ability to tailor a workout program to their special needs.
- **Work Experience** (medical fitness, corporate, club/private studios, etc.): Working in a variety of settings can teach you how to effectively guide different populations (i.e. seniors, students, sedentary individuals, or those with chronic health conditions or medical challenges) using a variety of tools and techniques. Take the opportunity to learn from seasoned and respected exercise professionals, teachers and health care providers who can provide you with valuable insights.
- **Obtain and maintain professional liability insurance:** Consider ACSM's insurance partner Forest T. Jones. To obtain rate information, contact FTJ directly at (866) 820-5183 and identify yourself as an ACSM Member or ACSM Certified Professional.

### Be a Lifelong Learner

Every exercise professional, particularly in the medical fitness space, should stay on top of the latest developments in the science and practice of exercise prescription, training and testing. This means attending conferences and workshops to acquire new skills and knowledge, reading relevant articles and journals such as *ACSM's Health & Fitness Journal*<sup>®</sup>, visiting [ACSM's website](#), reading ACSM's e-newsletters, and utilizing the latest publications to inform your practice. Consider some of these essential ACSM titles for your library:

- [\*ACSM's Guidelines for Exercise Testing and Prescription, 10th edition\*](#)
- [\*ACSM's Resources for the Exercise Physiologist, 2nd edition \(June 2017\)\*](#)

- [\*ACSM's Exercise Testing and Prescription\*, 1st edition \(Jan 2018\)](#)
- [\*ACSM's Clinical Exercise Physiology\*, 1st edition \(Oct 2018\)](#)
- [\*ACSM's Complete Guide to Fitness & Health\*, 2nd edition \(2017\)](#)

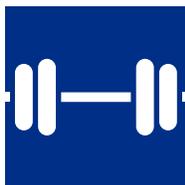


## Step 2: Connect with health care providers and medical practices

There are many ways to begin to establish connections with local health care providers and medical practices. Try any and all of these:

- Ideally, you work in a fitness facility that has developed a formal association with a local health care system or medical practice. Health care systems that have made a commitment to support healthy lifestyles for both patients and providers may offer various interventions, particularly as part of population health programming. Incorporating Exercise is Medicine<sup>®</sup> means that a practice has integrated the Physical Activity Vital Sign (PAVS) into the electronic health record (EHR) to assess whether the patient is meeting the National Physical Activity Guidelines. They have also set up a systematic referral process to allow patients to access physical activity resources (programs, places or professionals) in the community or within the health care system. Ask your club manager to approach clinic leadership at a nearby medical facility to offer exercise services through a formal partnership. Sometimes there are discounted memberships for employees of the health care system. Doing a good job with these clients and sending concise progress notes that can be scanned and entered into the EHR will position you as an extended member of the health care team.
- Health care providers appreciate brief “meet and greets.” A short face-to-face meeting helps to establish a personal connection. You may be able to catch a provider for a few minutes during lunch or invite them to an open house or lunch at your fitness facility. Put together a packet to include your business cards, flyers for patients, and a handwritten card.
- Your resume or marketing piece should be concise and highlight your most impressive education, certifications and skills. Indicate where you provide services (patient’s home, specific fitness facility, etc.). You might include one or two brief testimonials from satisfied providers or patients. This piece may be provided to interested patients at the time of their medical appointments. If the medical practice keeps a list of community resources for patients, your goal is to get on that list as a credible physical activity professional.
- If a client has made good progress, ask if they would be willing to share this information with their health care provider. Write a summary progress note that they can take with them to their next appointment. If a provider has 2 or 3 patients getting healthier and more active as a result of their work with you, that’s one of the best sources of advertising. Results speak volumes. Follow up by contacting the office and leaving your information/ business cards with the provider’s medical assistant; indicate the you have been working with several patients from the practice already.

- With the development of the National Diabetes Prevention Program (DPP), there may be opportunities to provide small group exercise or personal training services to class participants. Since these individuals have been diagnosed with pre-diabetes and possibly other cardiac risk factors, exercise professionals must have the knowledge and skills to work safely with these populations and possess a clinical fitness certification or the EIM credential. Go to the DPP website to find out about how to become a DPP lifestyle coach or identify local programs that might need fitness services ([www.cdc.gov/diabetes/prevention/index.html](http://www.cdc.gov/diabetes/prevention/index.html)). To facilitate a DPP program for Medicare participants, it is necessary to have a National Provider Identifier (NPI) number. Clinical exercise physiologists are listed in the NPI code. If you don't already have an NPI number, now is the time to get one. Go to: <https://nppes.cms.hhs.gov/#/>.
- Attend community lectures or events given by physicians and other health care providers, particularly around a topic of relevance regarding physical activity and health outcomes. Introduce yourself at the end, ask a thoughtful question about the topic, and ask if you could help them and their patients. Briefly share your educational qualifications and special training. Have business cards handy and indicate where you train clients (at a club, in their homes, etc.). Providers will be most impressed if you are knowledgeable, yet respectful and eager to learn more.
- Physicians who exercise are more likely to recommend physical activity to their patients. If you work closely with health care providers who use your fitness facility, ask them if they would be willing to refer appropriate patients to you or to a program within the facility. Ask what would make that process easy for them and their patient. Perhaps they could introduce you to a colleague or member of their medical team with whom you could discuss this in more depth.
- Many health care providers are more likely to refer to a specialty program that meets the needs of their patients, rather than an individual personal trainer. Develop, deliver and promote an Exercise is Medicine program at your fitness facility. EIM programs must meet certain criteria and be facilitated by exercise professionals with the EIM Credential. Small group exercise programs tailored to individuals who are not typically served by many fitness facilities (those with chronic diseases, older clients, etc.) provide needed social support, guidance and structure.
- Check to see if there is a Walk with a Doc program in your community (<https://walkwithadoc.org/>). In this program physicians generously share their time and go for a walk with patients, usually on a weekend morning. Join the walk, be friendly, and encourage the participants. Introduce yourself to any clinicians who are present and offer to assist with the program if needed, or to work individually with their patients.
- Volunteer to lend your expertise to community fitness activities sponsored by a local hospital/clinic. Write an article for a hospital health/wellness newsletter or website blog on the benefits of exercise for a specific medical condition, including brief training tips and your contact information. Partner with clinicians to give community presentations. Get your name out there!



## Step 3: Working with Referred Patients/Clients

### Patient/client safety is your first area of concern.

- When you accept a new client or receive a referral from a health care provider, use the [Exercise Preparticipation Health Screening Questionnaire for Exercise Professionals](#) form, guided by the updated screening algorithm found in the 10th edition of *ACSM's Guidelines for Exercise Testing and Prescription*. A **handy infographic** of this algorithm can be found on the ACSM website. If you have any questions about the individual's ability to safely engage in exercise, utilize the [Medical Clearance Form](#) and obtain the referring provider's approval and/or patient-specific guidelines. You may also use the [Health History Questionnaire](#), [Fitness Assessment](#), [Informed Consent](#) and [Cancellation Policy](#) forms that you'll find in this guide. To find the most recent version of the PAR-Q+ physical activity readiness questionnaire, go to [www.eparmedx.com](http://www.eparmedx.com).
- Utilize the latest edition of *ACSM's Guidelines for Exercise Testing and Prescription* to ensure that you are applying the most up-to-date recommendations regarding exercise for sedentary individuals and those with common chronic diseases or medical conditions.
- Thoughtfully apply the principles of progression, intensity and volume (frequency and time) to engage your patients in safe and enjoyable exercise. Begin with light-to-moderate intensity exercise (that the client enjoys and/or agrees to do). Move your client through a progressive transitional period to allow them to acclimate to the program, minimize the risk of musculoskeletal injuries, and have a pleasant experience to facilitate adherence.
- If your client is apparently healthy, provide [ACSM's Being Active for Better Health](#) patient handout (print or e-mail). If your client has a chronic health condition, look at [ACSM's Your Prescription for Health](#) series to see if your patient's condition is included. Provide a copy—if not already given to them by their health care provider—and review the disease-specific guidelines. This series has been reviewed by experts from the American College of Sports Medicine and includes information for health care providers and exercise professionals as well as a separate version designed for patients/clients.
- Be aware of any disease-specific risks associated with exercise when your client has a health concern. If your client experiences significant changes in their health or mobility status that may affect their ability to exercise safely, encourage them to contact their health care provider. If you have concerns or questions about the client's safety during a workout, discontinue exercise and seek advice from the referring provider and/or the appropriate medical expert.
- Monitor your clients for signs or symptoms of cardiovascular disease/distress. Know the closest location of an AED in your facility. Maintain your CPR/AED certification and periodically review the key steps and emergency procedures in your facility.

### Build a safe and effective program.

- Conduct an individualized assessment of the client/patient. This can be comprehensive or targeted to the individual's health concerns or primary diagnosis. Establish a baseline so that you can measure your client's progress. A sample [Fitness Assessment Data Sheet](#) is provided, but should be modified based on patient type, health, fitness, access to equipment, and setting.

- If the results of the Exercise Preparticipation Screening form indicate the need for medical clearance prior to the initiation of moderate or vigorous-intensity exercise, request a completed medical clearance form from the patient’s primary care provider. Consider using the sample [Medical Clearance Form](#). Fill out as much information as you can so that it’s easy for the provider or medical staff to complete it and send back to you (with the patient or by mail). Your client/patient will need to sign a release of medical information form at their doctor’s office, allowing you to receive any protected health information.

### Provide behavioral support to engage your client.

- Your ultimate goal is to build your client’s self-efficacy, so they continue to integrate physical activity into their lives long after their contact with you has ended. You want them to feel so good about their experience with exercise that they can say “I’m the kind of person who is physically active because it’s part of who I am now – and I actually enjoy it!”
- Utilize motivational interviewing to tap into the patient’s own reasons for being there and what lifestyle changes THEY would like to make, how THEY believe that they could be successful.
- Acquire new skills as a lifestyle or health/wellness coach to make you more effective in supporting and guiding your patients toward a physically active lifestyle. Wellcoaches, an ACSM partner, and the International Consortium for Health and Wellness Coaching (ICHWC) provide respected training and certifications for individuals wanting to move into this profession. <https://wellcoachesschool.com/> and <https://ichwc.org/>. Exercise professionals make themselves even more valuable in a health care setting when they can facilitate a spectrum of healthy lifestyle changes in this new role.
- Establish a schedule of regular appointments that works for your client. Plan to contact them via email, phone or text (their preference) to confirm their participation and reinforce their activity plan. Even brief touchpoints can help to keep your clients engaged and accountable. Leverage digital activity trackers and smart phone apps. Remember that in this era of technology, a personal touch and genuine concern can be powerful.



### Step 4: Communicating with Providers

Instead of hand-written patient charts, medical information is now managed almost solely through an electronic health record (EHR). This means that all information about a patient’s care, both within and outside of the physician’s office, must be communicated and stored electronically. This provides a challenge for community-based exercise professionals who deliver fitness services outside of the health system. Any written notes or assessment documentation will need to be scanned into the EHR by a member of the office staff to be part of the patient’s record.

You have several communication goals:

- if needed, ensure that you have medical clearance and individualized guidelines from the health care provider;
- provide information to the clinician from the patient’s initial assessment and send periodic progress notes (know that the patient can access their medical records so keep that in mind when offering opinions or making subjective observations about a client);

- establish your professionalism and responsiveness;
- refer the patient back to their provider when there is a concern or recommend other professional resources that may be helpful (dietitian, mental health professional, certified diabetes educator, etc.).

Consider the following tips:

- When communicating with a health care provider, use concise documentation and focus on functional outcomes and disease-specific data that may be affected by the physical activity intervention. [Initial Fitness Assessment/Physical Activity Plan](#) and [Patient Fitness Progress Report](#) sample forms are provided. Send initial assessment notes and periodic updates (every 3-6 months) to the health care provider. If your client tells you that they have an upcoming visit with their physician, this is an ideal time to either send a progress report or ask the client to carry one with them to the appointment.
- You may keep a detailed record of your client's exercise regimen and fitness measurements, but a summary of the most relevant data will be most appreciated by the provider – and may actually be read! This requires thoughtful decision-making about what's most likely to be clinically meaningful to the provider. You may also wish to report data related to compliance with the program (attendance, exercise volume) and/or achievement of the recommended levels of physical activity.
- Always protect the privacy of any patient/client information. If the fitness facility where you work has a formal partnership with a health care system, it is your responsibility to be aware of the basic tenets of HIPAA legislation and follow them. Don't discuss a patient's medical history, personal health, or fitness information with other clients or staff, unless your client has given written permission for you to do so. To enable communication between you and the client's health care provider, the client will likely need to sign a release of medical information form at the provider's office.
- Health care providers have clinic schedules and obligations that are stressful and time-consuming. They typically won't have time to speak with you during a busy clinic day. Rates of stress and burnout are at an all-time high. Physicians must rely heavily on a support team of medical and office staff to see patients and manage their practice. Anything you can do to make life easier or work through other designated members of the team will be appreciated. Ask when/how you can contact a provider if needed, i.e. phone, text or email, particularly if you have questions or concerns about their patient's response to exercise.
- Technology solutions: As health care systems explore ways to track and monitor patient health data and treatment compliance, mobile applications and digital tracking devices are beginning to be utilized. If you can enter patient data directly into one of these platforms to automatically sync with the patient record, that is ideal.

## Typical Sequence of Steps During a Patient's Office Visit

1. Patient moves from waiting room to exam room, where a medical assistant:
  - Measures the patient's weight, blood pressure and other vital signs (hopefully including the PAVS);
  - Asks the patient the reason for their office visit;
  - Asks the patient what medications they are currently taking;
  - Leaves the patient in the exam room, informing them that the health care provider will be in shortly.
2. Health Care Provider (MD, DO, NP, PA) enters the exam room and:
  - Reviews the patient's chart, looking at the reason for the patient's office visit, their body weight, blood pressure, and medications being taken, as well as any other relevant historical data;
  - Reviews/discusses the results of any tests made prior to the office visit;
  - Discusses areas of concern expressed by the patient or identified in the health history;
  - Makes appropriate recommendations to improve or manage the patient's health.
    - It is during this last ("recommendation") phase of the office visit that a health care provider can and should recommend exercise as a treatment solution and identify any activity limitations.
    - This is also the time when the health care provider could make a recommendation or referral for the patient to consult with a physical activity resource either within (physical therapy, cardiac rehabilitation) or outside the health system (fitness facility, exercise program, exercise professional).
3. MA or LPN returns to the exam room to follow-up with the patient and ensures that the patient understands the provider's instructions and next steps regarding:
  - follow-up testing or appointments
  - educational materials recommended by the provider
  - referrals or prescriptions

## Final Thoughts

Having a successful referral relationship with a health care provider or medical practice will allow you to make a difference in the lives of those who can benefit most from increased levels of physical activity. You will expand the health care provider's reach and effectiveness by providing services that they don't have the time nor the ability to deliver. Health care providers want to see how their patients benefitted from your intervention – show them results to confirm that you delivered.