Level 3 Exercise Referral course

Unit 3

**Planning Exercise Referral Programmes with Patients**  
Please use your manual to learn the content of this unit. This is a large unit, so take it one step at a time, working your way through the assessment elements gradually.  
   
**Assessment 4**  
To pass this unit, you are required to complete the **'Planning Exercise Referral Programmes with Patients' worksheet**, which can be found in your LAR. You are required to complete all questions with sufficient details to show clear understanding.    
  
**Assessment Element 5**  
To pass this assessment, you must complete a client consultation with your patient. Your patient must have a minimum of two of the following conditions\*;

* Hypertension
* Hypercholesteroleamia
* Chronic Obstructive Pulmonary Disease
* Asthma
* Obesity
* Type 1 Diabetes
* Type 2 Diabetes
* Osteoarthritis
* Rheumatoid Arthritis
* Osteoporosis
* Depression
* Stress
* Anxiety
* Simple Mechanical Back Pain
* Joint Replacement

\*Please refer to Unit 1 'Principles of risk stratification in exercise referral' to ensure your patient is not 'high risk', which is beyond the scope of this qualification. **It is important that you get confirmation from us that your client is suitable before proceeding any further.**   
**This consultation must be observed by your assessor either face-to-face or via video submission**. You must gain the following information from your patient;

* Exercise Referral form
* Transfer of medical information documentation
* Medical and surgery history
* Medications
* Physical activity history
* Physical activity preferences
* Motivation and barriers to participation
* Current fitness level
* Stage if readiness
* Personal and behavioural goals
* Physical measurements

You should use the information gathered to discuss and agree short, medium and long-term goals for at least 3 of the following aspects;

* Medical management
* Functional ability
* Psychological
* General health and fitness
* Lifestyle
* Physiological
* Social

**Please read the 'Patient Consultation Checklist'** (which you can find in your LAR) thoroughly before completing and filming your consultation with your patient. This is the criteria your assessor will need you to cover in order for you to pass this assessment. Please see the consultation tips below or feel free to contact your assessor for clarification on any of the assessment criteria before completing the consultation. We also advise that you take some notes or produce a detailed consultation form template, so you do not miss any information. If you do miss any information, then your assessor may be able to use the 'supplementary questions record' in your LAR, should you not cover any of the criteria sufficiently.  
  
Here is some additional tips to help ensure you include all the relevant information within your consultation…..

Consultation Tips:

Using a patient centred approach:

1. Explain your role and discuss how other professionals will be kept informed of patient progress (e.g. you will be writing a letter to the GP at the mid week stage to keep them up to date). Provide the patient with your contact details and how they could get in touch with you between sessions.

2) Explain the purpose of this initial consultation – which is to:

a. Go through the initial referral form (if applicable) and check there’s no changes and all data is correct since referral

b. Gather initial monitoring information – height/weight/BP, waist circumference, etc.

c. Discuss conditions and symptoms, medications

d. Chat about previous exercise experience

e. To work in partnership with the client and use the information to design a tailor made programme of exercise

f. To check that the client is happy with the consultation and information gathering process before going ahead

1. Explain how records will be maintained and treated confidentially in line with DPA. Ask the client if they are happy for you to share confidential information with health care provider. Is the patient agreeable with this procedure before recording any information?

THEN…

4) Go through the Referral form, check name, address, age etc and that all data is correct.

5) Confirm medical and surgical history and medications – clarify the conditions and discuss any health changes since the referral.

6) Discuss physical activity history and preferences, current fitness levels .

7) Discuss lifestyle behaviours .

8) Discuss motivation and barriers.

9) Discuss readiness and goals, explain the term SMART and ask the client for their input.

10) Take Physical measurements and clarify that all is correct since the referral. Your assessor will observe you taking height, weight, BMI, blood pressure, resting heart rate etc.

11) \*\* Assessments/measurements if applicable to the conditions, perhaps you can do a postural assessment and or joint range of movement assessment. \*\* Some clients may find the prospect of an exercise assessment a barrier so this is not always necessary in an initial consultation, this can be omitted but should be considered as could be useful for some referral clients.

12) Based on your findings and the referral form, and your programme (although it might not be complete) explain about a proposed timetable – e.g. once a week and explain the type of exercises and demands that that the patient will do with you. Let the patient know that the planned sessions with you will be in the gym, or at home.

13) Explain informed consent, show the form to the patient – and that when they signing the informed consent form and that they are aware of the risks and benefits to the proposed exercise sessions.

14) Explain other physical activities will complement the planned sessions that you will do with the patient and discuss the environments

15) Discuss how the programme will be reviewed – eg initial assessment, mid term (6-8 weeks) and end review (12-16 weeks) – give dates. Will there also be ongoing assessment and evaluations by your weekly screening and checks? Yes. Explain you will ask about their response to the previous exercise session and ask questions if there are any changes in health.

16) Thank the patient for attending this consultation

Please submit your session via You Tube link. We recommend you upload your video to YouTube as a private video giving access to jo@fit4training.com. **Submit your video link using our coursework submission form (link to form below). There is guidance on uploading your video to You Tube on your course page.**  
  
**Assessment Element 6**  
In order to pass this assessment, you need to design a structured exercise programme for your patient. Your programme needs to last a minimum of **4 weeks** and needs to detail;

* the resources required, including equipment and environment
* specific outcome measures, stages of achievement, and exercise which are:
  + appropriate to patients goals, medical conditions and fitness level
  + consistent with accepted good practice
* appropriate components of fitness and principles of training to help achieve short, medium and long term goals.

Please read the 'Exercise referral programme assessment checklist' found in your LAR, so you are aware of what you assessor is looking for when assessing your programme. It is advised that you create your own programme card template appropriate to your patient.  
  
**Assessment Element 7**  
In order to pass this assessment you are required to review your patients programme with your patient after the 4 weeks (minimum). This can be done remotely or face-to-face, but **before** submitting the questionnaire to your patient, you must complete the sections in your LAR which state the reason why you are requesting a review and you will also need to insert 4 of your patients goals in point 4 on the review questionnaire document (found in your LAR).  
  
Upon receipt of the completed questionnaire, use your patients responses to detail your recommendations to them (in the last column on the questionnaire document) and also complete the 'Adaptations to programme' document found in your LAR.   
  
Please read the 'Patient review assessment checklist' found in your LAR, so you are aware of what your assessor will be looking for when assessing your review.  
  
**Assessment Element 8**  
In order to pass this assessment, you are required to compose a **letter to a healthcare professional** informing them of your patients progress in meeting their goals. Please refer to the 'Letter to healthcare professional assessment checklist' for guidance on what your letter must include.

**USEFUL INFORMATION/LINKS**

Course Page – <http://www.fit4training.com/exref-resources>

Facebook Group – [www.facebook.com/groups/fit4trainingstudysupport](http://www.facebook.com/groups/fit4trainingstudysupport)

Student Support – Martin Brown [martin@fit4training.com](mailto:martin@fit4training.com)

Administration/general queries only relating exams, payments, resources, certificates.

Tutor/Assessor - Jo Bentley [jo@fit4training.com](mailto:jo@fit4training.com)

Assessment/course content support