EIM Professional Credential Workshop
Welcome to the ACSM/Exercise is Medicine® Professional Credential online workshop presented by Health & Exercise Connections, LLC

Objectives
1. Provide candidates with an overview of content related to the EIM credential certificate exam
2. Provide candidates with practical applications and tools to better manage clients and groups with chronic illness
3. To prepare candidates with resources and knowledge related to health care administration interactions and relationships

EIM credential workshop is a 5–part series focused on 3 key areas of interest:
1. Navigating health care administration (20%)
2. Behavior change strategies (20%)
3. Exercise prescription considerations for special populations (60%)
<table>
<thead>
<tr>
<th>Level</th>
<th>Patient Population</th>
<th>Credential Requirements</th>
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| Level 1 | Individuals at low or moderate risk who have been cleared for independent exercise | • NCCA accredited fitness professional certification  
• Successful completion of the EIM credential training course and EIM credential examination |
| Level 2 | Individuals at low, moderate, or high risk who have been cleared for independent exercise | • Exercise science–based bachelor's degree  
• NCCA accredited fitness professional certification  
• Successful completion of the EIM credential training course and EIM credential examination  
• EIM course and examination exempt for certifications with an emphasis on special populations (ACSM–HFS, ACSM–CES, ACSM–RCEP, ACE Advanced Heath Fitness Specialist) |
| Level 3 | Individuals at low, moderate, or high risk including those requiring clinical monitoring | • Exercise science–based master's degree OR exercise science–based bachelor's degree plus 4,000 hours of experience in a clinical exercise setting  
• NCCA accredited clinical exercise certification  
• EIM credential course and EIM credential examination exempt for those with ACSM–CES or ACSM–RCEP |
## Organizations with NCCA Accredited Health Fitness and/or Clinical Exercise Certification

<table>
<thead>
<tr>
<th>Organization</th>
<th>Accreditation</th>
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<tbody>
<tr>
<td>Academy of Applied Personal Training</td>
<td>National Council on Strength and Fitness</td>
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<tr>
<td>American College of Sports Medicine</td>
<td>National Exercise and Sports Trainers Association</td>
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<td>American Council on Exercise</td>
<td>National Exercise Trainers Association</td>
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<td>The Cooper Institute</td>
<td>National Federation of Professional Trainers</td>
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<td>International Fitness Professionals Association</td>
<td>National Strength and Conditioning Association</td>
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<tr>
<td>National Academy of Sports Medicine</td>
<td>Training and Wellness Certification Commission</td>
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<tr>
<td>National Council for Certified Personal Trainers</td>
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Session 1

Navigating health care administration
“I want to refer my patients to a fitness professional, but how do I know who to trust?” This is a common question from health care providers who recognize that exercise is one of the most effective prescriptions they can give a patient. Finally, there’s an answer. Turn to a fitness professional with the Exercise is Medicine® (EIM) Credential.
How To Work Effectively With Health Care Providers
SECTION AGENDA

- Professional Preparation and Marketing Materials
- Marketing Yourself
- Effective Communication with the Healthcare Provider
- Getting the Referrals
- Legal, Ethical and Privacy Issues
- Benefits to the Fitness Professional
- Benefits to the Healthcare Professional

http://www.exerciseismedicine.org/fitpros.htm
Supporting Materials

Health and Fitness Professionals’ Action Guide

HOW TO WORK WITH HEALTH CARE PROVIDERS:
A SYSTEMATIC APPROACH
Professional Preparation and Marketing Materials

- **Formal education**
  - Minimum of Bachelors degree in a Wellness/Exercise Science related field
  - Significant experience working in health – fitness field, particularly with medical organizations
  - Will improve your chances of being noticed and respected
Professional Preparation and Marketing Materials

- **Credentials**
  - Certified by an accredited fitness organization such as ACSM, NSCA, NASM or ACE.
  - Preferably NCCA-accredited – “Accredited Certification Programs” at:

  [http://www.credentialingexcellence.org/p/cm/l d/fid=121](http://www.credentialingexcellence.org/p/cm/l d/fid=121)
Practical skills
- Practical experience
- Internships, seminars, conferences, and work experience is vital
- Relevant certifications – fitness and/or clinical
- CPR, ACLS certification
Professional Preparation and Marketing Materials

- **Work Experience**
  - Variety of settings
  - Gain experience
    - Club setting
    - Corporate fitness centers
    - Private fitness studio
    - Medical fitness centers
    - Rehabilitation programs – clinically supervised
Professional Preparation and Marketing Materials

- For the Community Education Department Director
  - Resume
  - Detailed Work Experience
  - Community Involvement
  - Testimonials
  - Programs/Services you offer
Professional Preparation and Marketing Materials

- For the Physician (or other Healthcare Provider)
  - All of the above, plus
    - Professional liability insurance
    - Informed Consent form
    - Health and Medical Questionnaire
    - Fitness Assessment form
Marketing Yourself

- **Locate the Medical Facilities in Your Area**
  - Community Education Department
    - Commonly manage education programs available to adults, seniors, children, etc. focusing on healthy behaviors and resources within the community
    - May also be Human Resources, Marketing, Nursing
    - Phone number
    - Email
  - Find out who is in charge
    - Community Education or Education Director or Coordinator
  - Find out what classes or resources are offered

Health insurance providers likely have additional programs and resources that may be of interest and important to EIM professionals.
Marketing Yourself

- Contact the Community Education Department Director/Coordinator
  - Set up a meeting by calling and/or emailing
  - Be Patient and Persistent
  - If you are unable to arrange a meeting
    - Attend one of the education courses that the facility offers.
    - Network!

*Don’t forget to bring your press kit when you attend the class!*
Marketing Yourself

- Talk to the Community Education Department Director/Coordinator
  - Discuss your intentions
  - Ask if you can give a presentation of your services to their team
  - Ask if you can give a presentation during one of their educational classes
  - If the Community Education Department Director/Coordinator is reluctant:
    - If you have to, volunteer your time!
Marketing Yourself

- Delivering your press kit to a physicians office
  - Directly approach each of the physician’s/health care provider’s “gatekeepers”.
  - You’ll probably find this more difficult (and certainly more labor intensive)
Marketing Yourself

- Face to Face Marketing: What to say to the office manager/front desk employee:
  - Introduce yourself appropriately
  - Smile
  - Gauge your audience, use appropriate terminology
  - Look professional
Marketing Yourself

- Be polite
  - Remember: please, thank you, may I???

- Your title
  - Fitness professional is pretty vague

- Hand kit over
  - Do not shove it in their face, but do not hand it over timidly
Marketing Yourself

- How to Follow Up with the Office Manager/Front Desk Employee
  - Follow up in person
  - Ask for the physician/health care provider’s business card or their email address
  - Consider working with physician’s assistant(s) and/or referral coordinator when available
Marketing Yourself

- The Secret Back Door?
  - Clinical Exercise Physiologists, Physical Therapists, Respiratory Therapists and Nurses who work in the program
  - Use Professional Association websites
    - ACSM (American College of Sports Medicine)
    - CEPA (Clinical Exercise Physiology Association)
    - EIM (Exercise is Medicine)
Effective Communication
With the Healthcare Provider

- **When to Call the Physician/Health Care Provider**
  - During office hours physicians and health care providers are patient focused
  - When leaving a message, be concise and to the point, but do not hurry
Effective Communication
With the Healthcare Provider

- Leaving a Voice Mail to the Physician/Health Care Provider
  - Introduce yourself
  - Remind them of your press kit
  - Your goal/purpose
  - Your certifications
  - Ask to talk or meet
  - Thank them

- Remember that providers are often very busy and work on tight schedules, which means patience while waiting for return correspondence is required!
Effective Communication
With the Healthcare Provider

- **What to Do When the Physician/Health Care Provider Calls You Back**
  - Have your press kit ready again, know it well, refer to it
  - Be ready to explain your services, focus on how your services will benefit them
  - What matters to them is how your services will benefit their practice
    - How will your services enhance their standard of patient care?
    - How will your services save them money or make them money?
Effective Communication
With the Healthcare Provider

- **If You are Contacted by Email:**
  - Answer their questions professionally and specifically
  - Tell them how you can enhance their ability to take care of their patients – be brief and straight to the point
Effective Communication
With the Healthcare Provider

- If You are Contacted by Phone:
  - If they leave a message, call them back as soon as possible
    - Health Care providers are used to timely responses
    - They are indicating that they are interested, so you must do whatever it takes to make it happen
    - Have all pertinent information readily available for reference
Effective Communication
With the Healthcare Provider

- If You are Asked to Meet with the Health Care Provider:
  - Prove your knowledge and skills can take care of their patients
  - Go over your press kit, questionnaires and assessment documents
  - Tell the physicians that you will always be open to their suggestions and opinions – *and mean it!*

Stress the benefit to their patients which in turn will impact their practice.
Effective Communication
With the Healthcare Provider

Remember, the people that they refer to you will always be their patients first and your clients second.

Always thank the physician for their time and willingness to work with you.
Keep in mind a physician usually has only a few minutes they actually spend with their patients, so your information and ability to refer to you needs to be brief, to the point, easy to do. Remember during their few minutes with a patient, providers are typically attending to other issues that may need referrals for other specialists and procedures. The EIM tool-kit provides you with an exercise prescription pad template to use with your information (written or electronic).
Getting the Referrals

- **Monthly Updates**
  - Many health care providers are used to monthly updates, similar to Medicare requirements to have physicians review and sign care plans for cardiac rehab patients
  - Once a month, provide a brief report to each doctor about the status of their patients that you are working with
Getting the Referrals

- Your Monthly Note
  - *Include*
    - Brief paragraph on subjective progress, only a few sentences
    - Include some objective measures
    - Thank the physician
  - *Plus*
    - Use nice paper
    - If you hand write, make sure you have good handwriting
Getting the Referrals

- Professionally Build Your Business
  - Business brochures
  - Flyers
  - Offer exercise prescription pads
  - Thank you notes / Gift cards
  - Consistency and branding
Legal, Ethical and Privacy Issues

- **Professional Liability Insurance**
  - [http://www.ideafit.com/fitness-insurance](http://www.ideafit.com/fitness-insurance)
  - Available through ACSM, or other certifying agencies

- **General guidelines / Exercise Limitations from Physician**

- **Individual Run Businesses vs. commercial based fitness centers**
  - Emergency services plan
  - Safety equipment? AED?
  - Are you prepared to work with more specialized populations?
Health and Medical Questionnaire

- Every client, every time
  - If you have any questions, refer back to physician for clearance or clarification
Fitness Assessment Form

- Helps with determining initial fitness / risk
- Helps to define goals
- Essential for evaluation of progress
- Additional tool to communicate progress with physician
Consent Forms

- Clearly outlines services to be rendered
- Risks
- Benefits
- States that client has had a chance to review and acknowledge understanding & acceptance
Many health and fitness professionals do not have statutory or administratively defined *scope of practice*

- Be aware of your limitations
- If you have questions, talk with the organizations who awarded you your certifications – resources are available
Never Diagnose!

Even if you are right, communicate findings and relay concerns to the proper healthcare professional.
Benefits to the Fitness Professional

- Increased Client Base
- Variety in Work
- Rewarding Work
- Making a Difference
- Critical Networking
- Professionalization of the Professional
Benefits to the Healthcare Professional

- Demonstrate that exercise **REALLY** is medicine.
- Put some action into your words
- Don’t forget to walk the talk
Questions?

- Contact Health & Exercise Connections @ certificationsuccesscoach@healthexconnex.com
- Questions will be responded to within 48 hours of receipt

Thank you for participating in the EIM Credential learning series