# Pre-exercise screening procedure

SOP TEMPLATE

Check this template against your local regulations and your own policies before you use it.

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|---|---|---|---|---|---|
| SOP no. | | Version | | Effective date | |
| Owner | | Approver | | Review date | |

## Purpose

To find members and clients who may be at higher risk during exercise, and to make sure they get medical advice before starting or increasing exercise.

## Scope

Every new member and personal training client, and existing members whose health changes.

## Responsibilities

| Role | Responsibility |
|---|---|
| Front desk or trainer | Gives the form, reviews the answers and explains next steps. |
| Manager | Makes sure forms are stored privately and staff are trained. |

## Procedure

1. **Complete the screening form**

   Ask every new member to complete the form before their first workout.

2. **Review the answers**

   Check every question is answered. Read any yes answer with the member.

3. **Ask for clearance when needed**

   If the form or your industry's screening tool says so, ask them to see a doctor before starting, and get the clearance in writing.

   > **Caution:** Never diagnose or give medical advice. Refer to a doctor.

4. **Adjust the program**

   Follow any limits the doctor sets, and tell the trainer who works with them.

5. **Store the form privately**

   Keep screening forms where only staff who need them can see them.

6. **Screen again**

   Ask members to tell you if their health changes, and rescreen personal training clients each year.

## Records

- The completed screening form and any medical clearance.

## Related documents

- New member onboarding checklist

## Revision history

| Version | Date | What changed | Approved by |
|---|---|---|---|
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