

## Telehealth Training and Counselling Guidelines for CSEP Certified Members



## Background

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The following document is intended to provide CSEP Certified Personal Trainers® (CSEP-CPT) and CSEP Clinical Exercise Physiologists™ (CSEP-CEP) with the tools and information necessary to provide telehealth (also known as online or virtual) services to clients.

Regardless of the method of delivery, CSEP Certified members are bound by their CSEP [Scope of Practice](#), and are expected to undertake all appropriate steps to pre-screen their clients for physical activity.



## Telehealth Training: What is it, is it right for you and your client?

Telehealth, or virtual training or counselling, is becoming a more and more common practice in health care sectors. In Canada in particular, geographical limitations make the ability to connect with your clients critical to their continued care.

There are several platform options for telehealth, including live-streaming apps such as Skype\*, FaceTime\*, and Zoom\*. These applications are widely used by the public already as a communication tool and therefore may be easily adopted by your clients. They offer you and your client the opportunity to interact in real-time, so that you may review their exercise form, or offer motivational counselling or coaching as needed. It is important to obtain your client's permission before connecting with them via these applications, as the connection may not be secure. If you plan to record these sessions, special consideration must be given to the storage of the recording to follow provincial privacy of health information protection laws or federal [PIPEDA](#) legislation, whichever applies to your situation (where you practice).

Other platforms such as Trainerize\*, Physioteq\*, True Coach\* are offered to Qualified Exercise Professionals (QEPs) for a fee. These applications offer a variety of methods to provide exercise prescription to your clients, often with the additional benefit of built-in video demonstrations, automatic reminders, chat fields, and so on.

Type	Pros	Cons
Live Streaming Applications	<ul style="list-style-type: none"><li>• Can interact/motivate/counsel with the client in real-time</li><li>• Can review and correct client's form</li><li>• User-friendly</li><li>• Low cost/free</li></ul>	<ul style="list-style-type: none"><li>• Not secure</li><li>• Requires a stronger internet connection</li></ul>
Exercise Prescription Platforms	<ul style="list-style-type: none"><li>• Built-in video demonstrations</li><li>• Automated reminders, tips, messages</li><li>• May be more secure</li></ul>	<ul style="list-style-type: none"><li>• Can be costly</li><li>• May be more difficult for some users to master</li></ul>

*\*Specific platforms are provided here as an example of what is available to you. This does not constitute an endorsement by CSEP.*

You will need to discuss with your client which option or platform is best for you and them.

- Do they have a secure internet connection? Audio, video? - both are preferred.
- Are they comfortable with technology?
- Is there any equipment they will need, e.g., Therabands, resistance modalities such as weights, or equipment they already have and anticipate using e.g., stationary bike?

## Responsibilities of the CSEP certified member

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As a CSEP-CPT or CSEP-CEP, your professional liability insurance will respond to insured claims arising from telehealth training or counselling, provided you are adhering to the requirements stipulated in your policy. These requirements are laid out in the following documents:

- [COVID-19 Telehealth Resource \(2020\)](#)
- [COVID19 Insurance Coverage Position Statement](#)
- [Informed Consent to Use Electronic Communications to Provide Telehealth Services](#)
- [Protecting Privacy During a Pandemic](#)
- [Remote Consultation: What CSEP-CPT and CSEP-CEPs need to know](#)

### Working within your CSEP Scope of Practice

Whether working with your client in-person or remotely, the CSEP-CPT or CSEP-CEP is always bound by their CSEP Scope of Practice. This is also a condition of your professional liability insurance policy.

- [CSEP-CPT Scope of Practice](#)
- [CSEP-CEP Scope of Practice](#)

If you decide to offer telehealth services outside of your 'home' province, be sure to familiarize yourself with any legal requirements or overlapping Scope of Practice issues that may exist.

**CSEP Certified members are not insured to work outside of Canada.**

### Maintaining the same professional standards as in-person training

- Pre-screening: CSEP Certified members are expected to employ client pre-screening for physical activity, regardless of whether you are training remotely or in-person.
  - Have your clients completed the [CSEP Get Active Questionnaire](#) or other evidence-informed pre-screening tool before undertaking any new physical activity?
  - Page 6 of this document includes guidelines on remote heartrate and blood pressure screening.
- Safety: Please take as many measures as is reasonable to ensure the safety of your client, and as appropriate, depending on their treatment or training plan.
  - If they are exercising indoors, is the space clear of obstacles, slip/trip hazards? This may include children - are any children in danger of getting hurt from well-intentioned participation?
  - Does the client have someone at home or nearby they can signal, should they get hurt?
  - Have you established a level of tolerance scale with your client? How will you know if they are in pain or have over-exerted themselves?
    - Refer to CSEP PATH® Toolkit: *CSEP-PATH: Rating of Perceived Exertion (RPE)*
  - Do you have a phone number or other method to contact the client, should the connection fail?

- Privacy: If your training session is being recorded, how will this recording be stored?
  - Refer to, and follow relevant privacy legislation in your jurisdiction.
- Documentation: Similar to how you would document an in-person session with your client, be sure to maintain progress reports, charts, intake, or status update forms. **Store these in a secure location at all times.**
- Billing: Be sure to indicate on any invoices to clients, which training sessions are for in-person training and those that are provided via telehealth.

### **Additional privacy and confidentiality considerations**

Regardless of which remote training application you choose to utilize with your client, you will undoubtedly need to send and/or share information electronically. Before doing so, it is recommended that you obtain your client's written consent. A sample consent form can be found here in the CSEP Toolkit included with the CSEP-PATH, and further details from your insurer can be found on page 4 of this document.

You may want to consider obtaining a cyber security and privacy liability insurance policy to address any additional risks and exposures related to remote delivery of services. Please contact CSEP's liability insurance broker, BMS Canada Risk Services Ltd., at 1-844-517-1370 or [csep.insurance@bmsgroup.com](mailto:csep.insurance@bmsgroup.com) for more information.



## TELEHEALTH PRE-PARTICIPATION SCREENING GUIDELINES – NEW CLIENTS

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Except for the measurement of resting heart rate (HR) and resting blood pressure (BP), the pre-participation screening process should proceed as per normal. This means having clients complete the informed consent and Get Active Questionnaire, as well as gathering information from client about their medical history, medications, and physical activity levels.

### **Obtaining Resting HR:**

If a client has a wearable device that measures HR, (e.g., smart watch or chest strap measuring HR), use this value for the purposes of the assessment. In all other cases the CSEP Certified member will need to instruct their client on how to measure their own pulse.

### **Obtaining Resting BP:**

Clients that have their own automated BP cuff available to them, can measure their resting BP this way. Otherwise ask the client if they have a recently measured resting BP (e.g., doctor's visit, consultation with a CSEP certified member, drug store measurement, etc.). Note: medical offices will often provide a recent resting BP over phone to their patients.

Client has a recent resting BP measurement: Use this resting BP as a surrogate. As per normal pre-participation screening procedures, the client's resting BP must be below 160/90 mmHg to proceed to physical activity (assuming that there is no other history suggestive of an elevated risk with physical activity).

### Client does not have a recent resting BP measurement:

In all situations listed below, professional judgement should be used. If the CSEP Certified member is unsure or feels that they do not have the knowledge or skills to work with a client safely within their Scope of Practice, the CSEP Certified member should not work with them. Rather, refer them to a CSEP Certified member with appropriate expertise in providing exercise guidance to this population (such as a CSEP-CEP with advanced training working with clients with cardiovascular disease) and/or wait until a resting BP reading can be provided. If a decision is made to proceed to physical activity, chart steps taken to ensure the benefits of physical activity outweigh any risks (e.g., pre-participation screening completed with no concerns, resting BP obtained by client, educated client on safe PA experience, etc.).

### **Scenario 1: Client Participates in Regular Physical Activity (PA):**

- If client has no contraindications to PA given pre-participation health screening, continue PA at current intensity. Proceed to a higher intensity PA gradually and as tolerated.
- If it is determined that client has a positive response on Get Active Questionnaire or presents with other medical history of concern, ensure that the benefits of proceeding to PA *clearly* outweigh any risks (e.g., client does not have any signs and symptoms suggestive of cardiovascular disease, does not have co-morbid disease, etc.). A CSEP-CPT may need to refer such clients to a CSEP-CEP or health care professional. A CSEP-CEP must use professional judgement given the lack of a resting BP measure and determine if it safe to continue PA at current intensity.

**Scenario 2: Client Does NOT Participate in Regular PA:**

- If client has no contraindications to PA given pre-participation health screening, begin light-moderate intensity physical activity. Increase intensity of PA gradually and as tolerated.
- If determined that client has a positive response on Get Active Questionnaire or presents with other medical history of concern, it is strongly recommended that client obtains a resting BP measurement before proceeding to moderate intensity physical activity.

\*Remember to refer to the CSEP Guidelines ([website link here](#)) on what is defined as regular Physical Activity (PA) as well as the definitions for low, moderate, and high intensity PA.