Table of Contents

Consult Overview 3
Main Screen 4
Toolbar Icons 4
Tab & Question Navigation 5
Setup 6
Setting up Doctor Referral Letter Template 6
Setting up Instructor Performance Management Report 7
Entering an Assessment 8
Entering profile information 8
Editing Customer Details 8
Summary Tab 9
General Health Check 10
Sub Questions 10
Heart Health Assessment 12
Heart Health Assessment Score 13
Goals, Activity & Lifestyle Questions 14
Goals Tab 14
Goals Settings Tab 15
Activities Tab 16
Lifestyle Tab 16
Measurement Tab 18
Aerobic Fitness Tab 19
Life Fitness Mode 20
Monark Mode 21
Food Variety Checklist Tab 22
Functional Testing Tab 23
Notes Tab 23
Completing an Assessment 24
Reporting 25
Customer Assessment Summary 25
Health Club Appointment Report 34
Instructor Appointment Report 36
Instructor Performance Management Report 37

Health and Wellness Report 39

Consult Overview

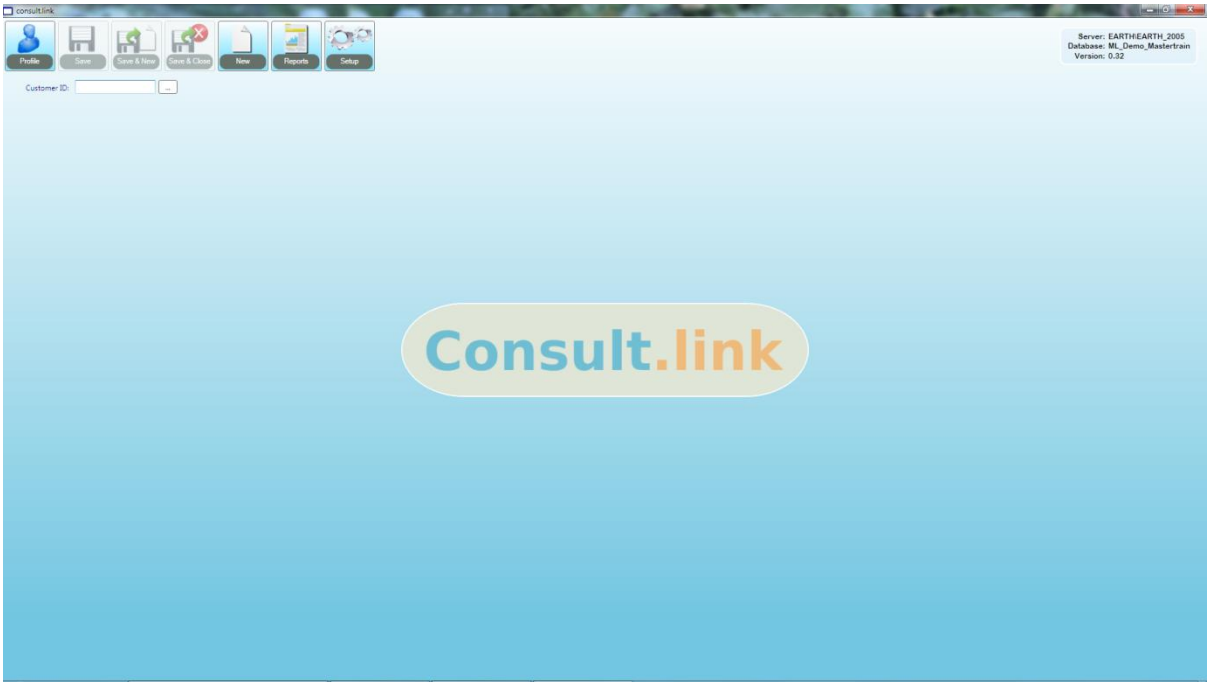
The Consult Module of Links Modular Solutions is a standalone application that works with the Links Modular Solutions database. It has the ability to be installed on machines that do not have Links installed but the machines must be able to connect to the Links database. The customer details are the same as those in Links and data can be updated in both applications.

Consult is design to capture data from the Health Consultation appointment process and can then be used for personal comparisons for example so a member can track their weight loss or the like. The data can also be reviewed holistically for a complete view of your Health Clubs customer progress.

To enter data into the Consult application you must have this module selected in your Links security parameters.

Main Screen

When you open Consult, the screen will look like the below. To begin entering an assessment you will need to search for a customer or enter a customer ID.



Toolbar Icons

Profile: This is where the details of a customer's assessment are entered

Save: This will save the assessment record and leave the details on the screen

Save & New: This will save the assessment and clear the screen for entering the next assessment

Save & Close: This will save the assessment and close the Consult application

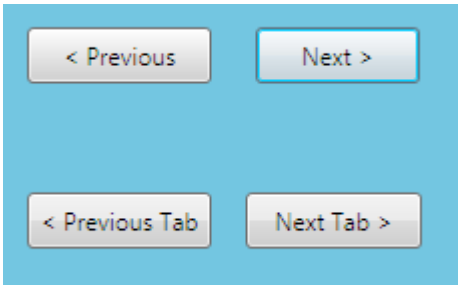
New: This will clear the screen for a new assessment to be entered

Reports: This will take you to the reports screen where you can run a range of reports from

Setup: There are a few setup options for Consult which you can setup here

Tab & Question Navigation

When you are working through the tabs you will see different previous and next buttons. In the example below, when you click Previous it will take you to the previous question, as opposed to Previous Tab which will take you back a tab.

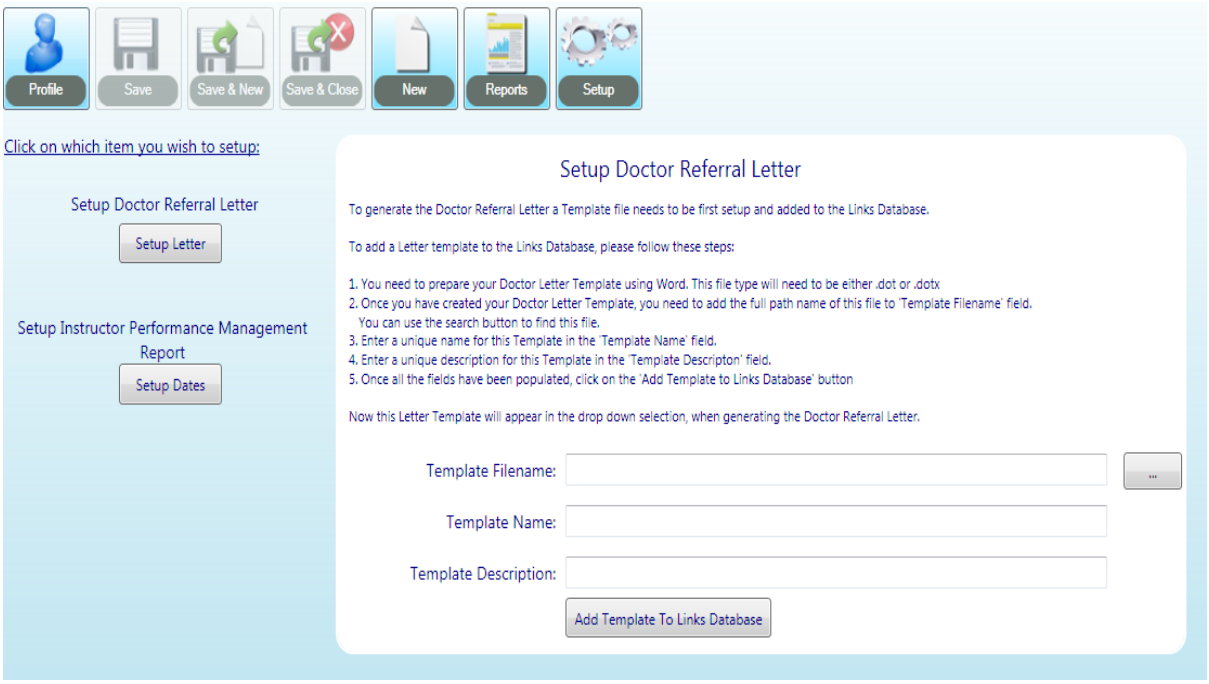


Setup

Setting up Doctor Referral Letter Template

To setup a letter template you will need to create a template in Microsoft Word before completing this process.

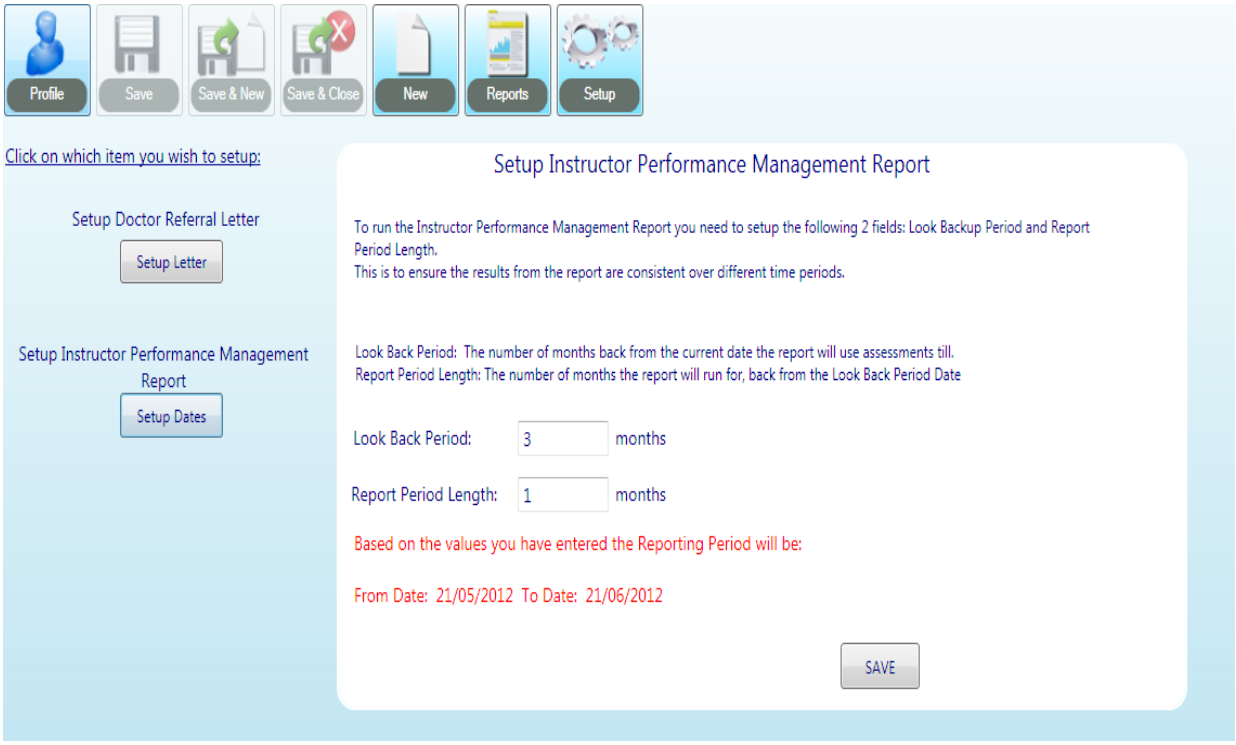
Following the instructions as outlined on the screen. The template will then be available when you attempt to print a doctor referral letter.



Setting up Instructor Performance Management Report

This screen allows for data parameters to be set when utilising the Instructor performance management report.

Following the instructions as outlined on the screen.

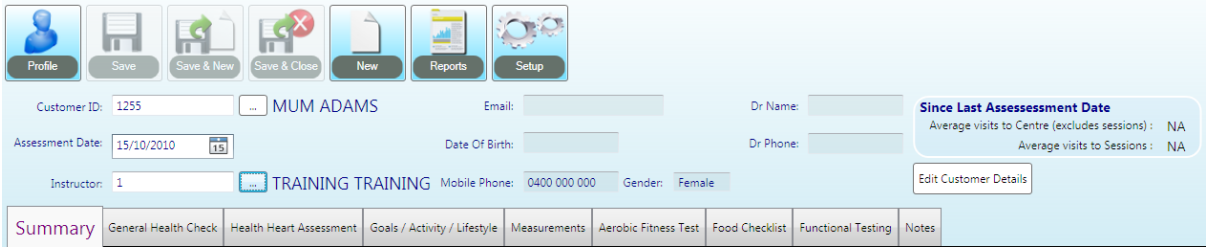


Entering an Assessment

An assessment is made up of eight tabs. Depending on your organisational requirements not all tabs may need to be completed. If you do not wish to complete a tab, you can select the option 'This section will not be completed'. All tabs must be completed or marked accordingly before you can save an assessment.

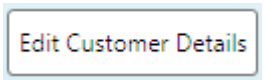
Entering profile information

1. Enter a customer ID or search for a customer
2. Enter an assessment date if not today's date
3. Enter your Instructor Staff ID

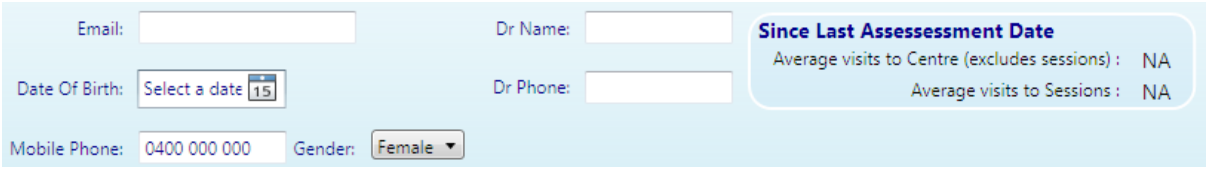


Editing Customer Details

If a customer's details are not complete then you will need to complete some details before you can complete an assessment particularly the **date of birth**. To edit customer's details;

1. Click 

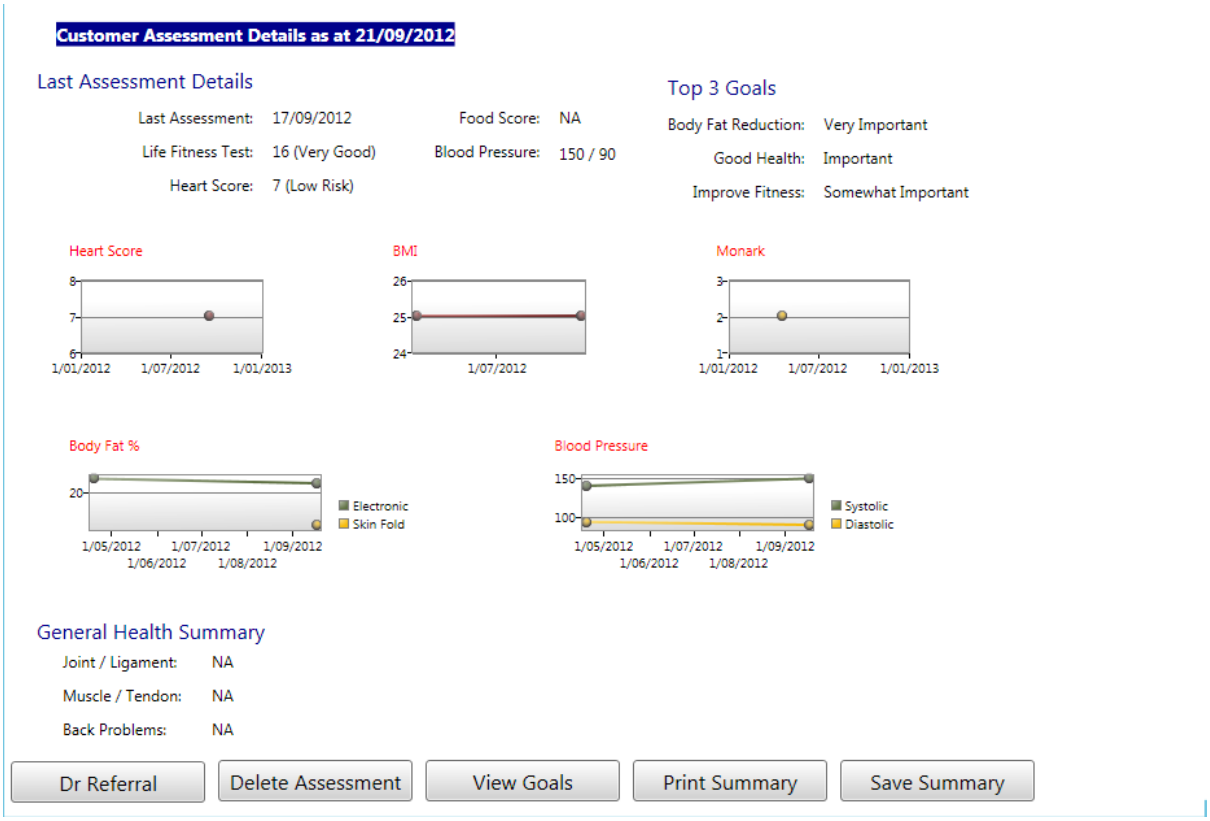
2. The fields will now be active
3. Enter the missing details as required



Summary Tab

This tab will show you a range of details such as last assessment and some of the most recent scores.

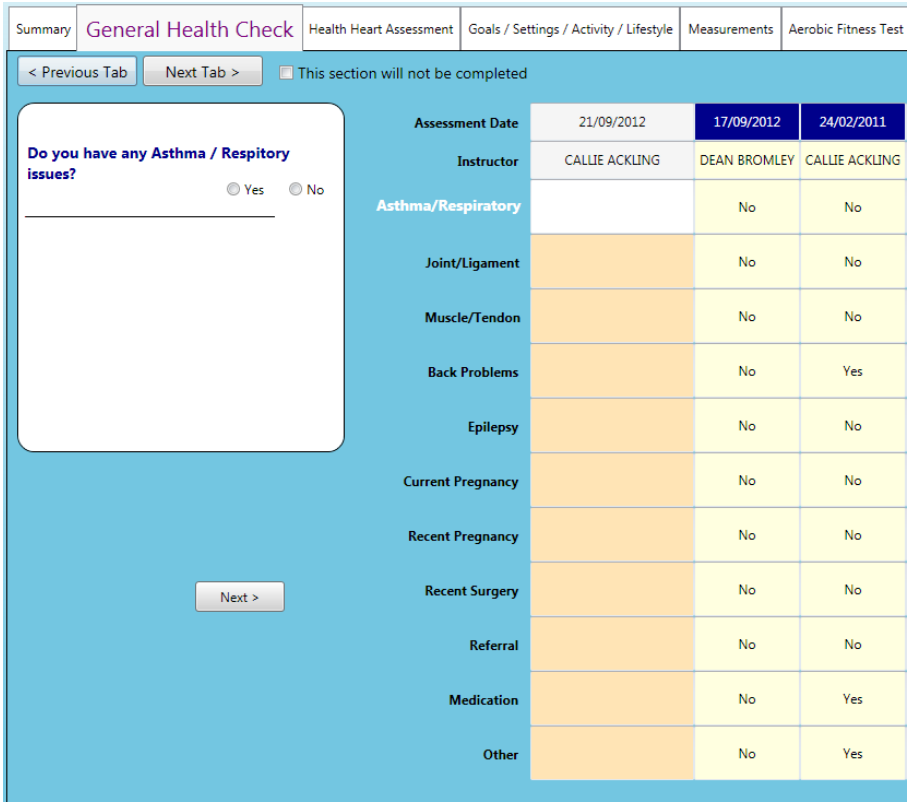
You can also manually print a Doctor Referral Letter from this screen, view goals, print the summary results and if you security allows you can delete previous assessments that may have been entered in error.



General Health Check

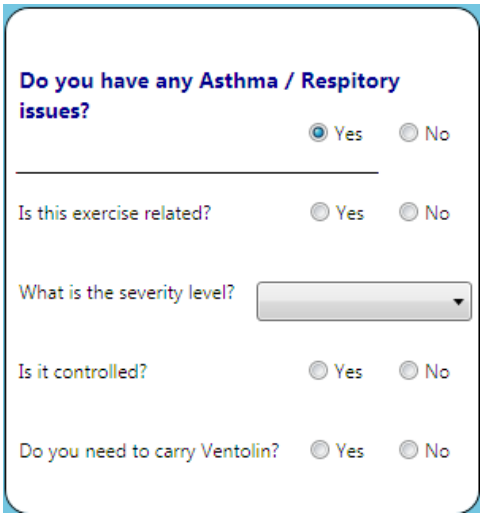
The general health check is a range of questions you will ask a customer to ascertain their current medical conditions. If you select No for a question it will proceed to the next question. You can click on the white/orange space of a question at any time to edit that question.

Responses from previous assessment are displayed to the right of the current assessment.



Sub Questions

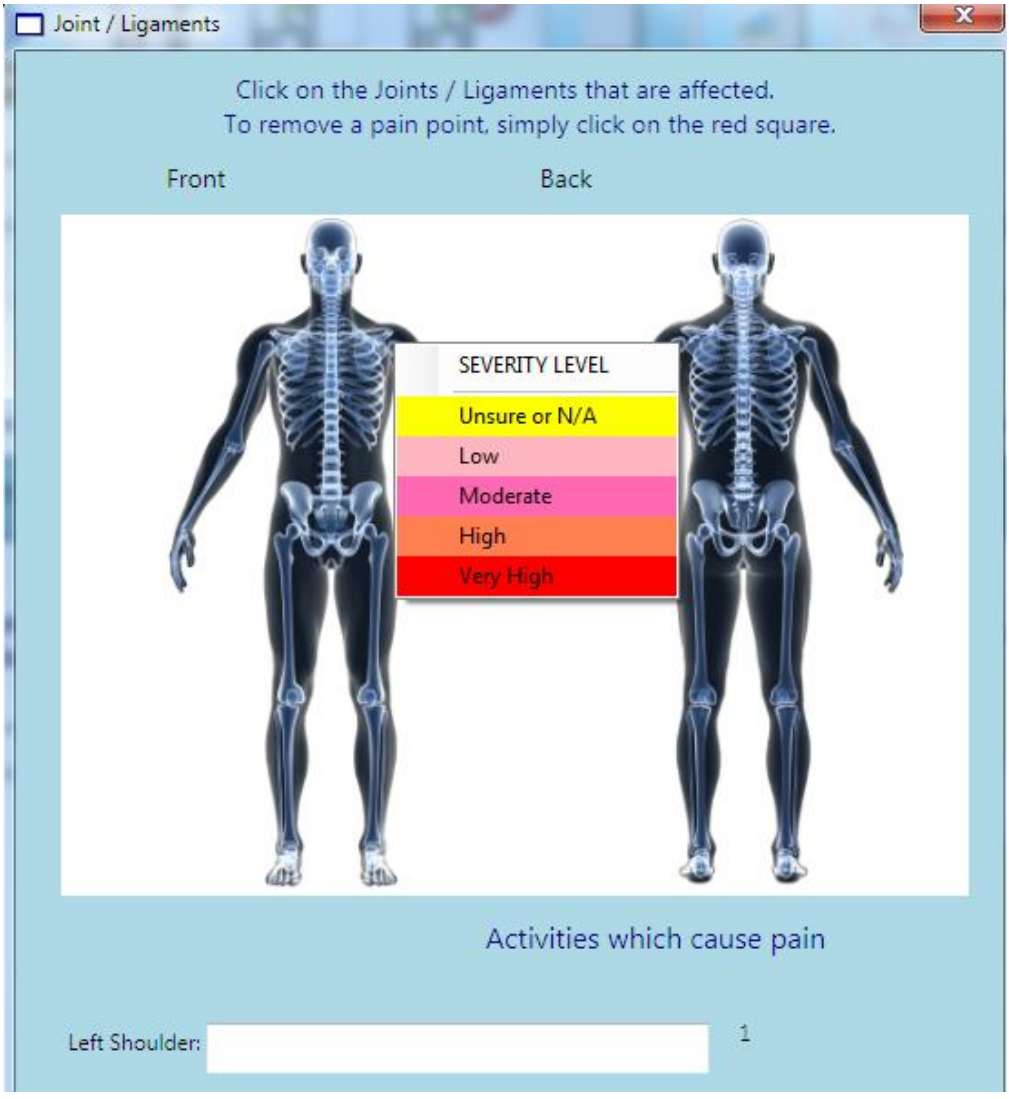
If you answer YES to a question then sub questions as seen below may also apply.



Recording Joint/Ligament, Muscle/Tendon & Back Information

If you answer YES to question 2, 3 or 4 then you will have the option to include some detailed information about the customer's injuries or ailments. For example see below the human body pictures for Join & Ligament questions. If a customer has a joint complaint, you will need to;

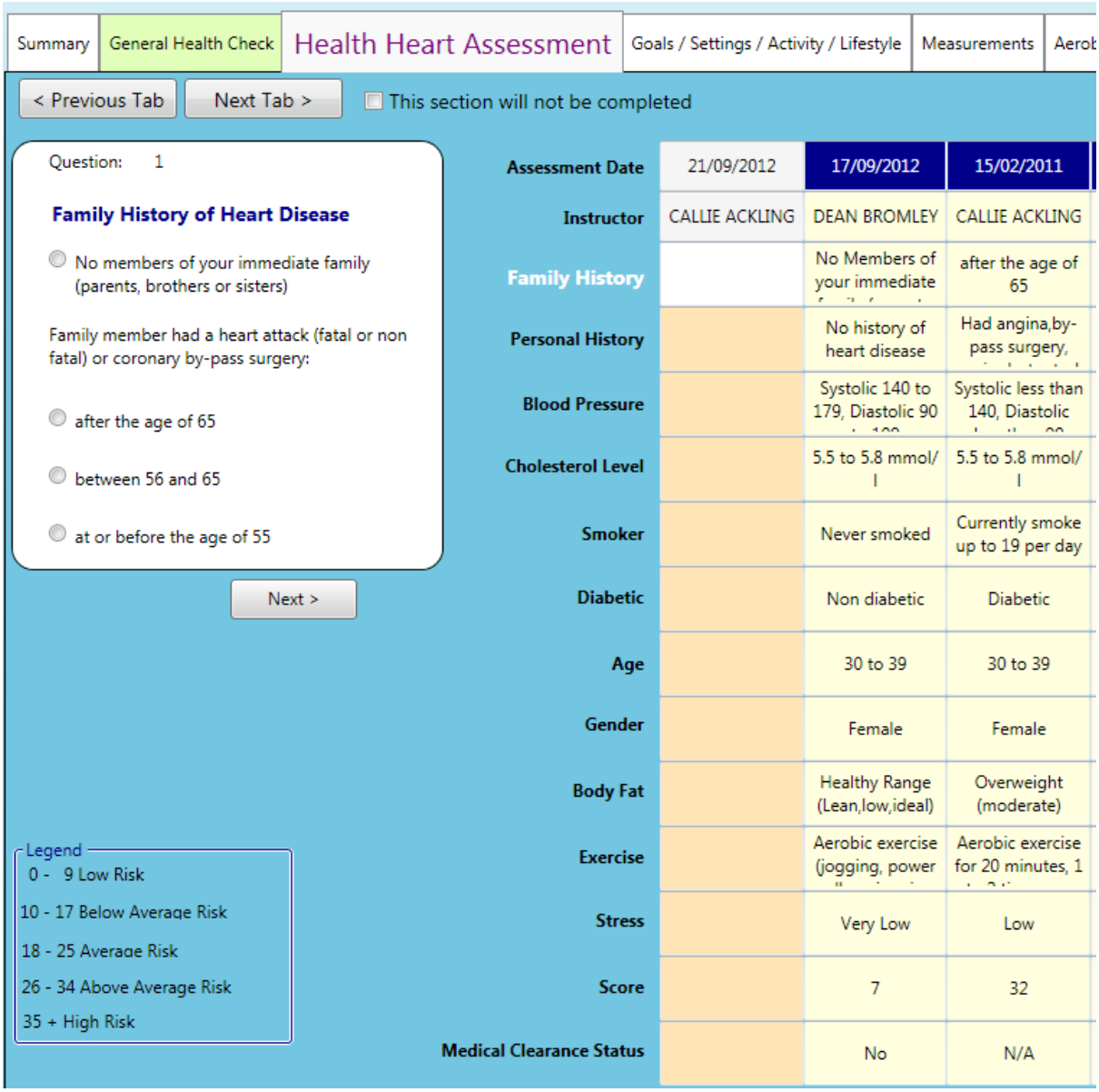
1. Left mouse click once on the joint effected
2. Choose a severity level
3. This will create a notes section below. You can choose to enter additional notes if required
4. The joint will display with a number with;
    - 0 = Unsure/NA
    - 1 = Low
    - 2 = Moderate
    - 3= High
    - 4 = Very High



Heart Health Assessment

The heart health assessment is a series of questions that will need to be answered by the customer and will then determine a Heart Health Score that is graded against the shown legend. Once you have selected an answer to each question it will move forward to the next question.

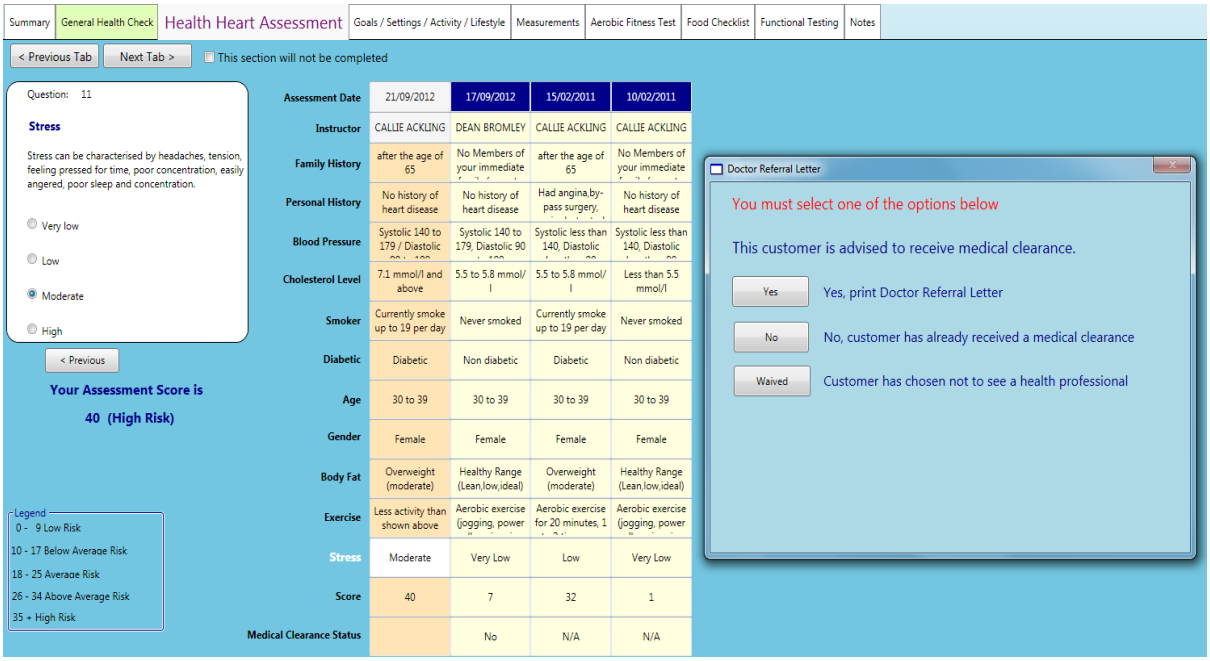
Responses from previous assessment(s) are displayed to the right of the current assessment.



Heart Health Assessment Score

If a customer has high blood pressure or reaches a score of 26 or more, a screen will display that recommends a medical clearance be sought. You can choose to:

1. Yes = Print Doctor Referral Letter
2. No = Customer has already provided a medical clearance
3. Waived = The customer waives their rights to receive a medical clearance



Responses from previous assessment(s) are displayed to the right of the current assessment.

Goals, Activity & Lifestyle Questions

This section of the assessment is broken into 4 sub tabs:

1. Goals
2. Goal Settings
3. Activities
4. Lifestyle

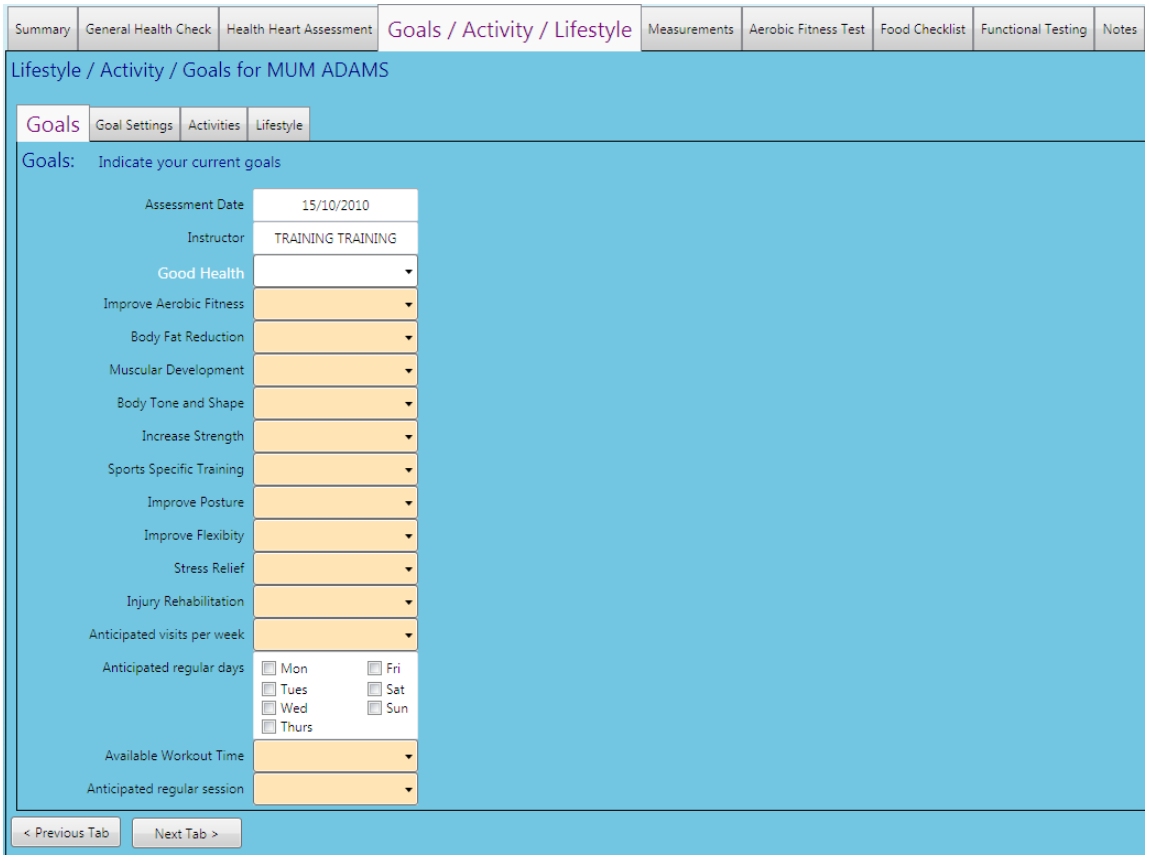
Each sub tab will need to be completed if you are completing any part. You can skip the whole tab if you wish to.

Responses from previous assessment(s) are displayed to the right of the current assessment.

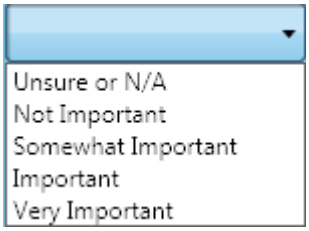
Goals Tab

This tab asks you to request from the customer their goals in relation to particular areas such as Body Fat Reduction or Stress Relief. Essentially each question is prefixed with

"How important is _____ to you"



As they answer to you each question you will need to select from the drop down below

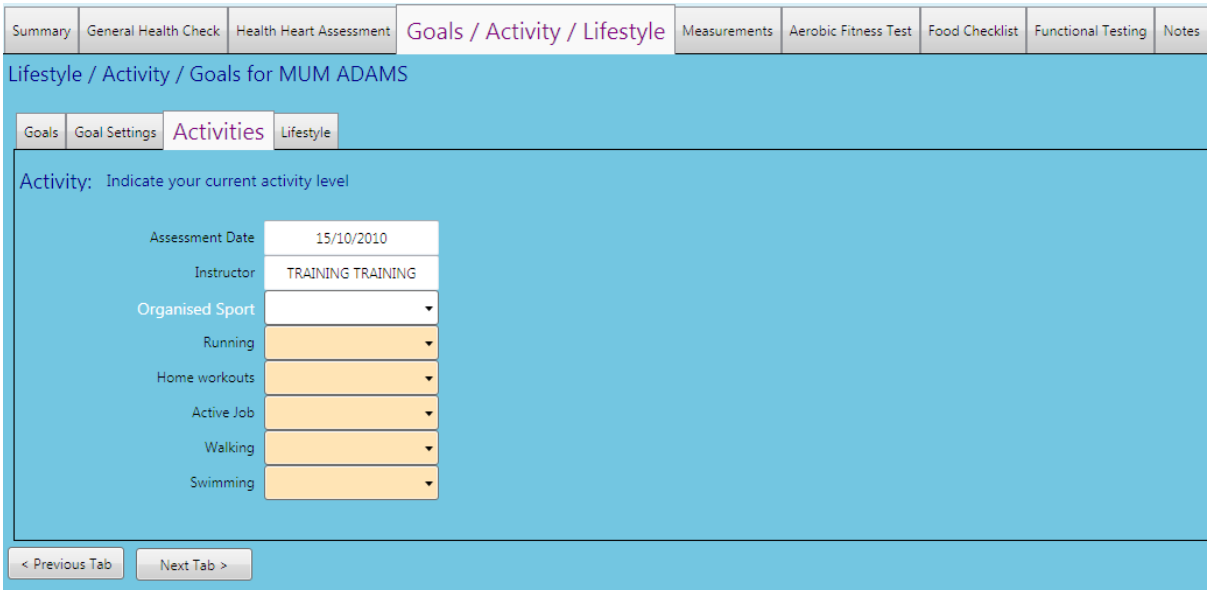


Goals Settings Tab

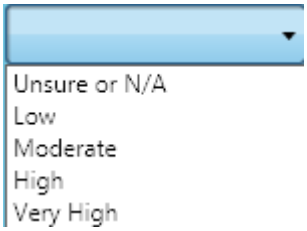
This sub tab is designed for you as the instructor to enter the customer short, medium and long term goals and set target dates. These are free text fields and will be displayed on the assessment summary report. From the summary report goals can be updated to reflect attainment status and the attainment date.

Activities Tab

The activities tab requires you to ask the customer how often they currently complete a specified activity.

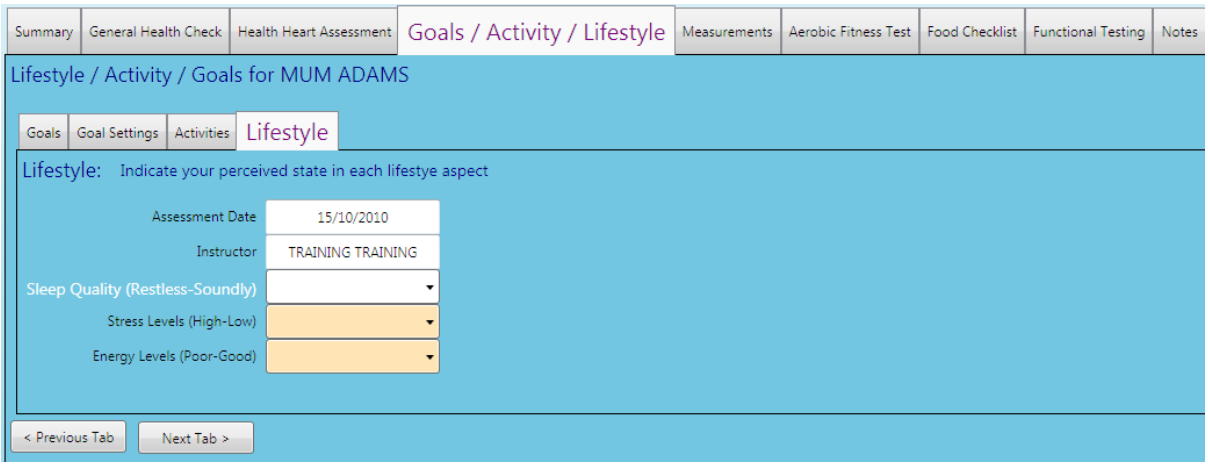


Upon receiving each response, you can select from the list below



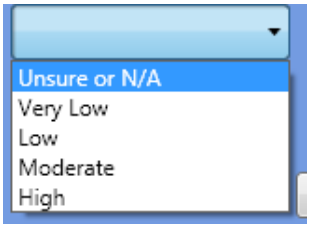
Lifestyle Tab

The lifestyle sub tab allows you to collect information about a customer perceived state of a range of lifestyle aspects.



As you ask each question you will need to record a response from the drop down below.

For example is someone said they are very stressed then the answer would be 'Poor'

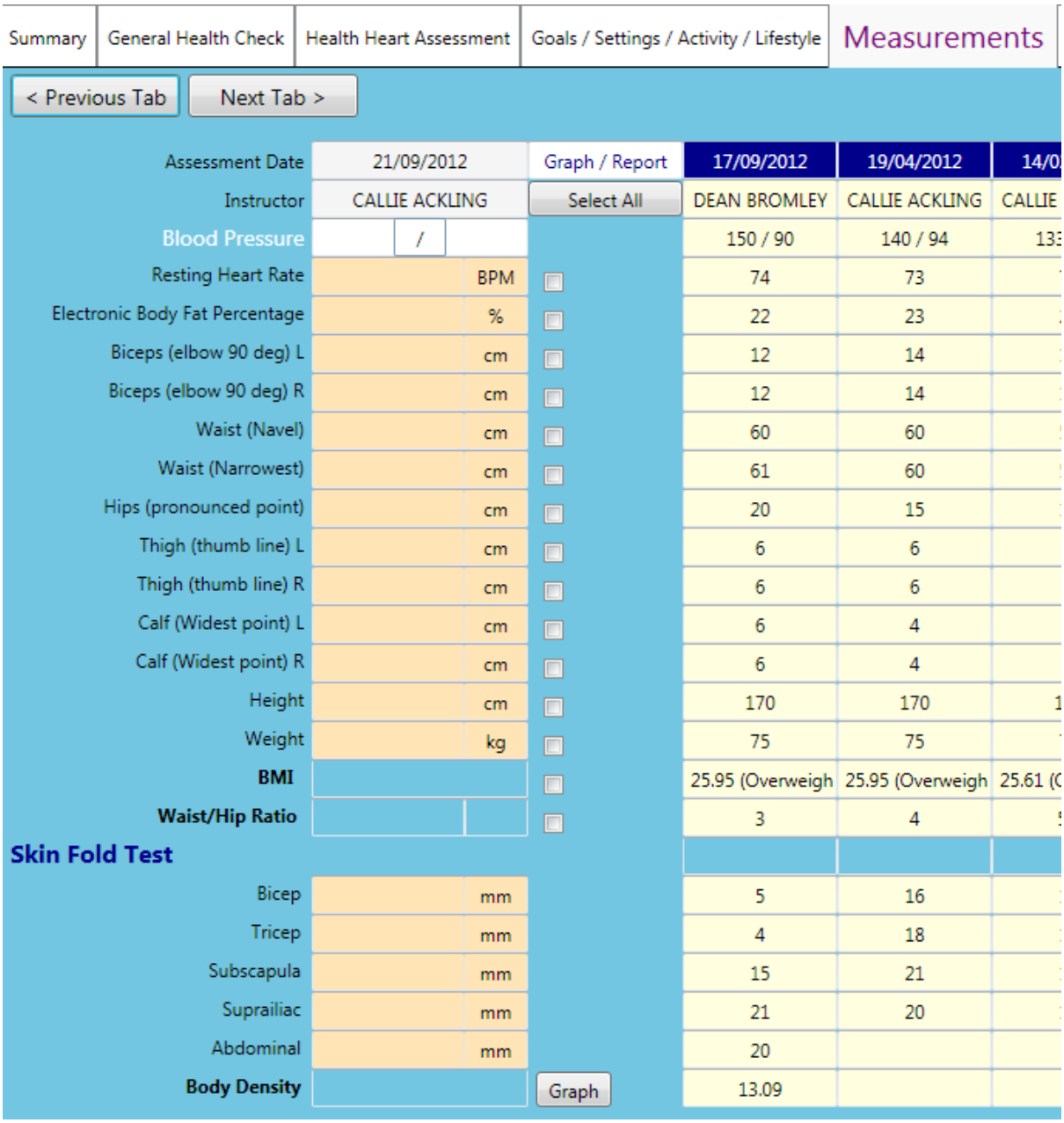


Measurement Tab

In the measurement tab you will need to record all of the measurements taken, you do not need to record a result for every measurement listed if the customer does not want all measurements done.

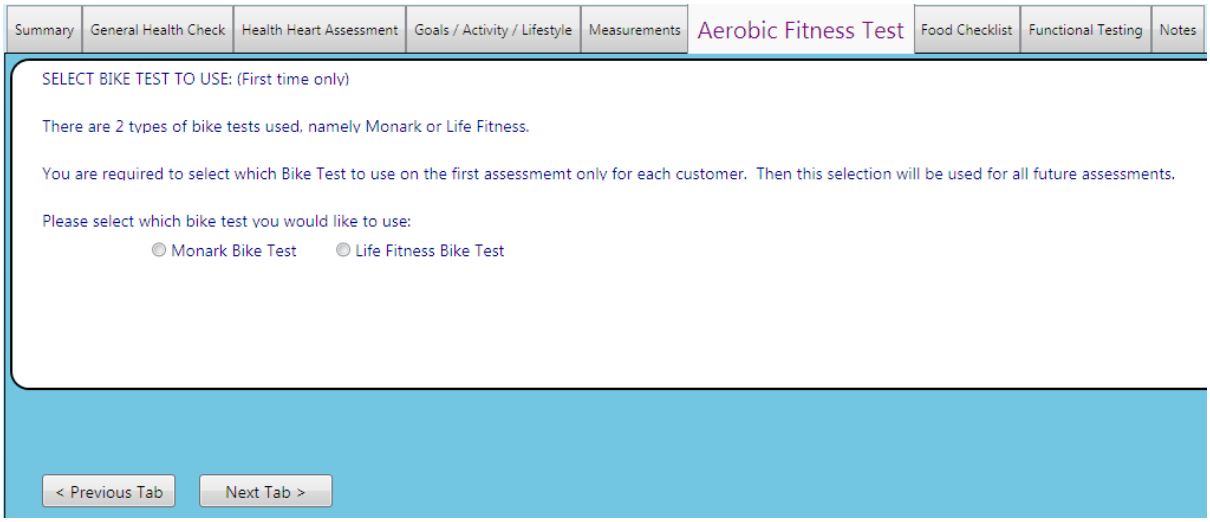
For customers under 16, the BMI score will not be calculated, and if skin folds are selected, then for reporting purposes this Body Fat Percentage (Body Density) will be used over the electronic record.

Skin fold calculation is based on using the results from the following 4 sites - abdominal, triceps, thigh and suprailiac.



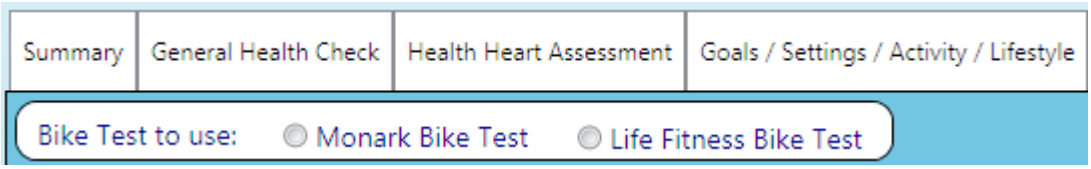
Aerobic Fitness Tab

For aerobic fitness tests you can choose to either use the Monark or Life Fitness test. On the first assessment you will need to choose which method will be used.



Selecting the mode after first use

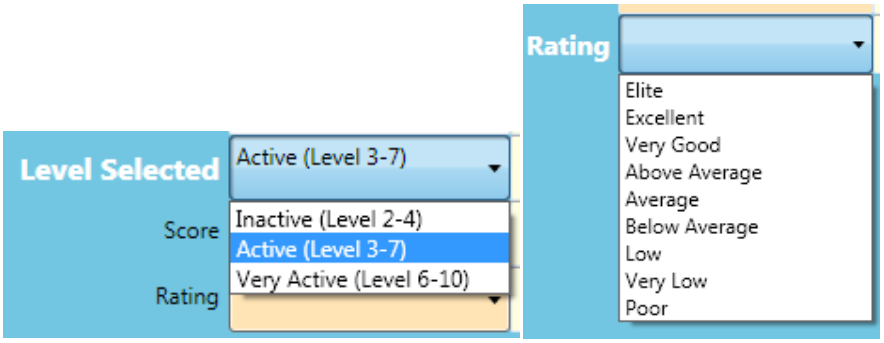
Each subsequent assessment will default to use the first selected mode, however this can be changed if required.



Life Fitness Mode

If using the Life Fitness mode you will need to complete the following;

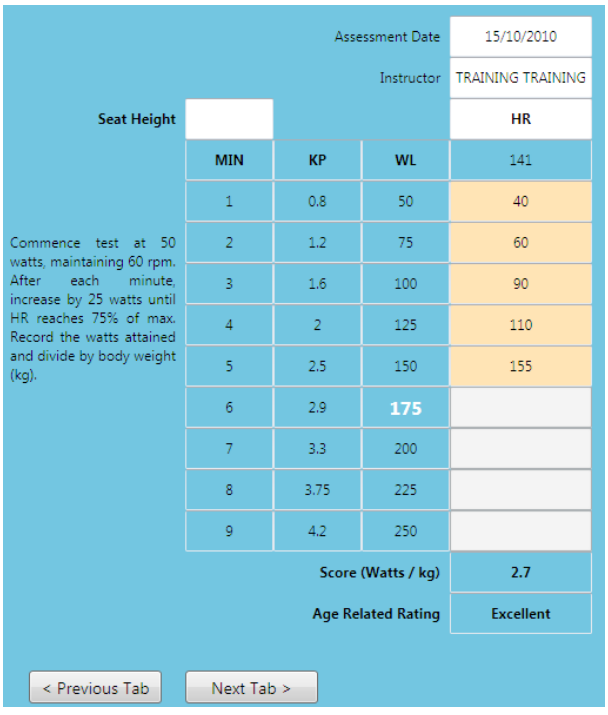
1. Select Level from dropdown list
2. Enter score
3. Select Rating from dropdown list



Monark Mode

If using the Monark mode you will need to complete the following;

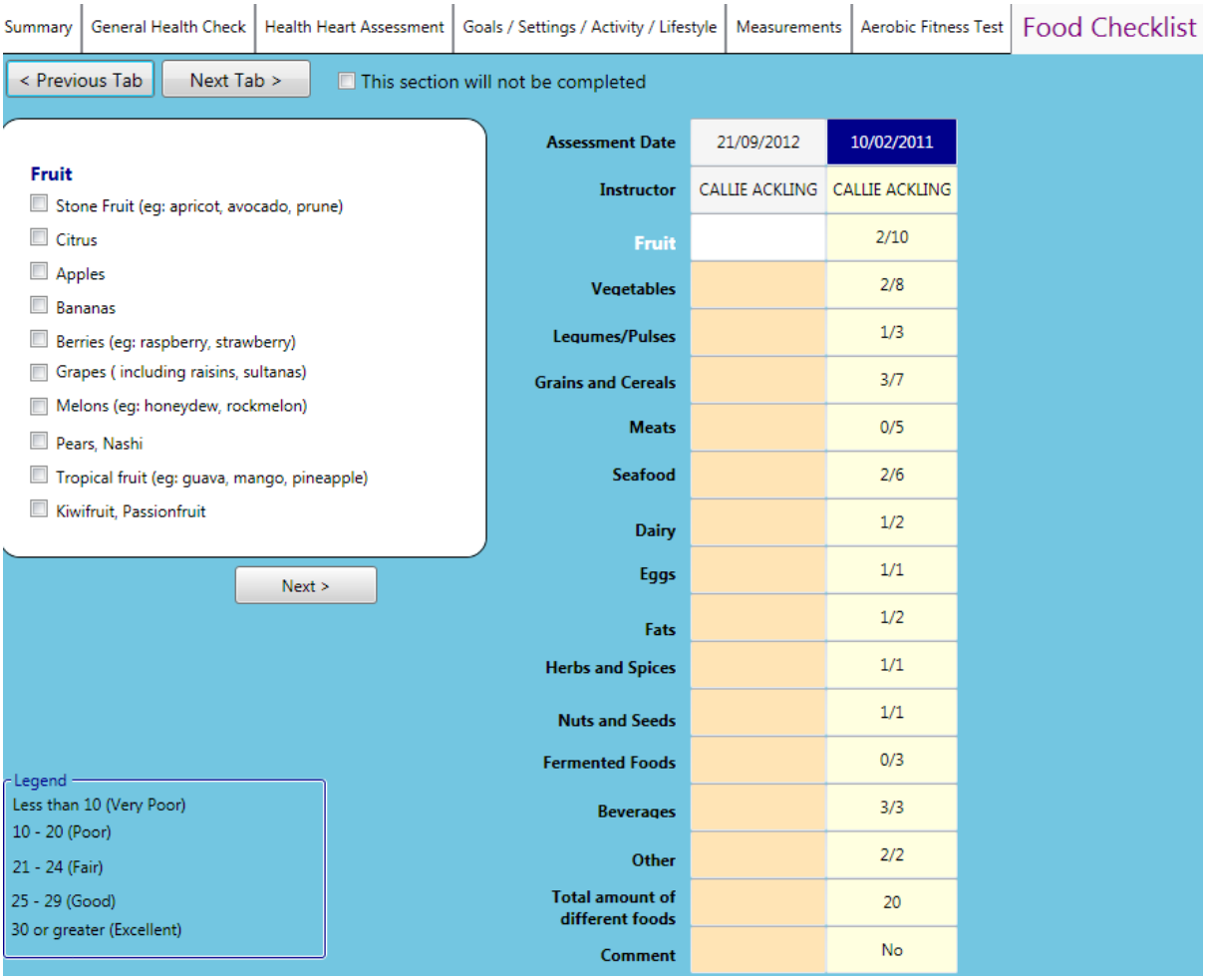
1. Enter seat height (this will remain for future assessments)
2. Enter the Heart Rate at each minute interval
3. Once the max is reached the test will not allow you to enter more results and a score and rating will be automatically calculated



Food Variety Checklist Tab

The food variety checklist will allow you to collect information about what a customer has eaten in the last 7 days. This will then provide a score for that customer on the variety of foods they have eaten. The last question also allows for additional comments.

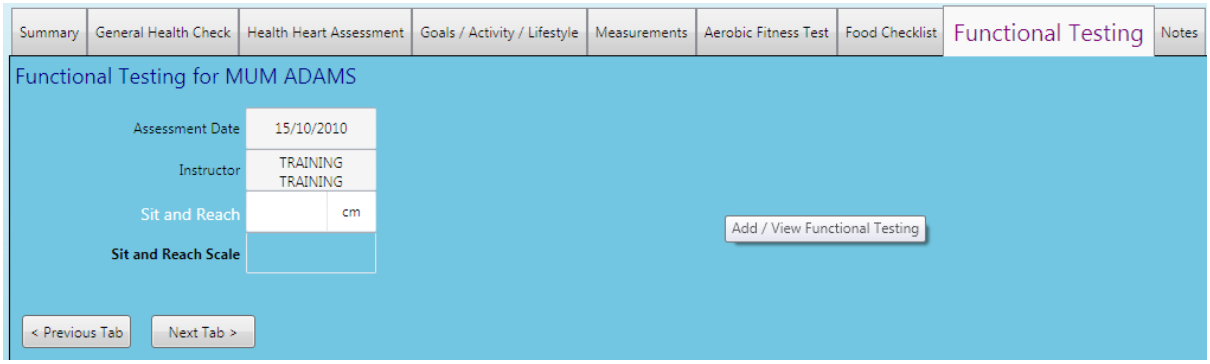
Once you have selected 0 or more foods for each group, you can click on Next to continue to the next question. You can revisit a question at anytime by clicking on the result.



Functional Testing Tab

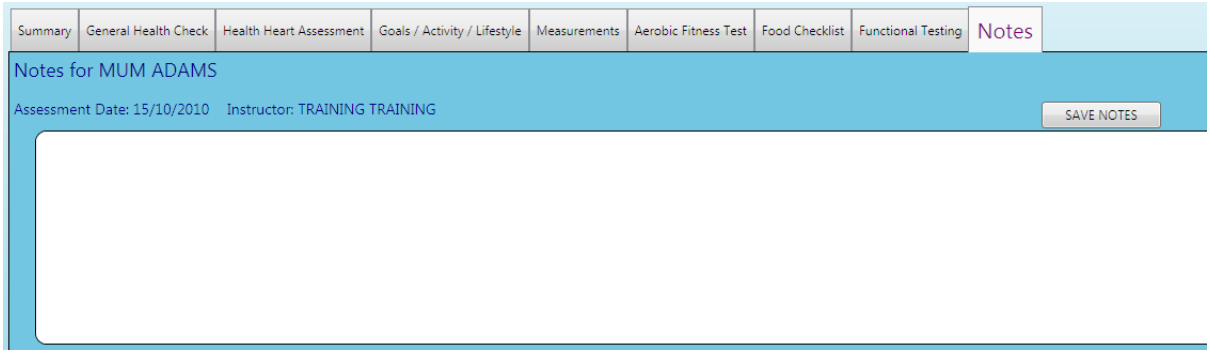
The functional testing tab currently records the 'sit and reach' test score in centimeters.

Enter the number of centimeters a customer has reached. If the score is negative this can be enter before the number i.e. you could enter 15 for a flexible customer or -10 for a not so flexible customer.



Notes Tab

The notes tab allows you to enter free text notes about a customer's assessment and to save, click on Save Notes.



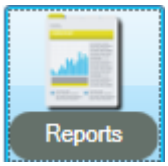
Completing an Assessment

Once an assessment has been completed and all tabs are filled in or marked as "This section will not be completed" you will see that the save icons become active. You can then save, save and close or save and begin a new record.

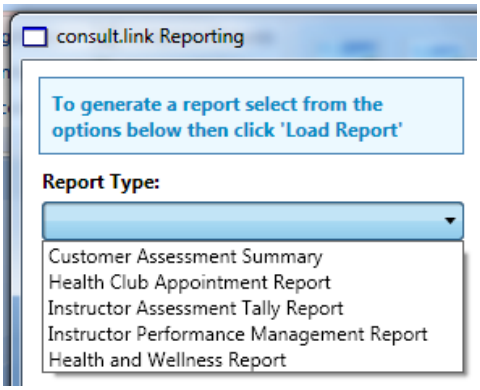
Note: Each tab will be shown in green once it is successfully completed

Reporting

To access and generate reports within Consult, click on the Reports icon.



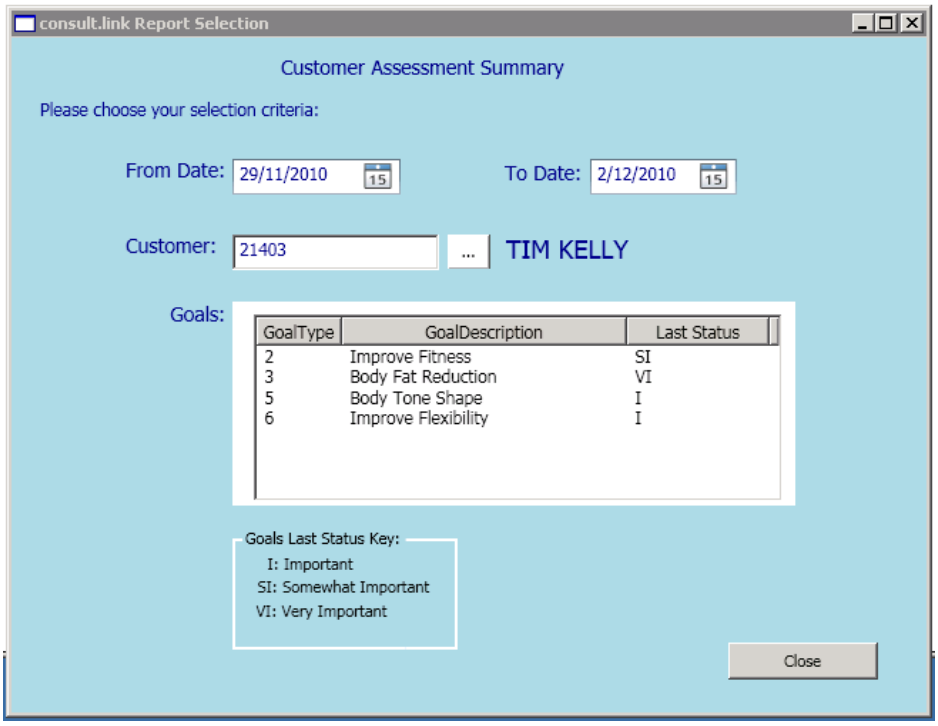
Click the drop down list to choose from the 3 reports available. The applicable report can be chosen from the drop down menu as seen below.



Customer Assessment Summary

The customer assessment summary is used to chart a client's goals over a period of time, and the level of importance attributed to them.

- From Date: beginning date of viewing period
- To Date: final date of viewing period
- Customer: Select client name to view
- Goals: summary of goal type and current status. Only Important or higher goals will be displayed



Once the selection criteria is complete, click Close and Load Report.

The Report can be printed or exported as a Word, Excel or PDF.

Customer Assessment Summary

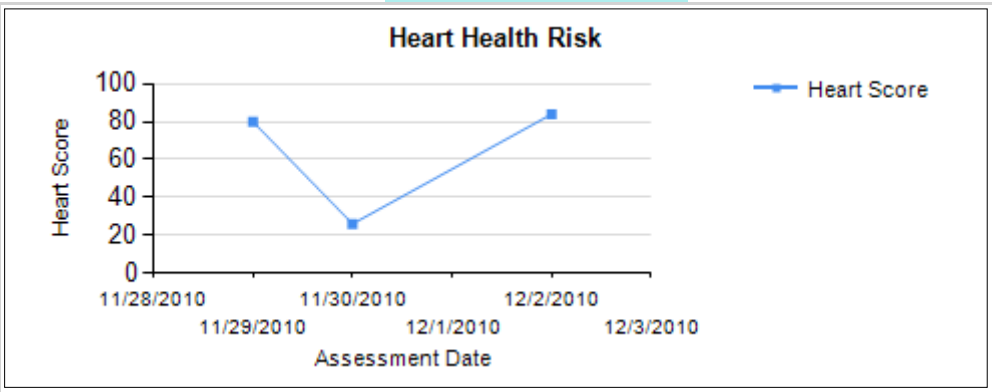
Customer ID: **21403**

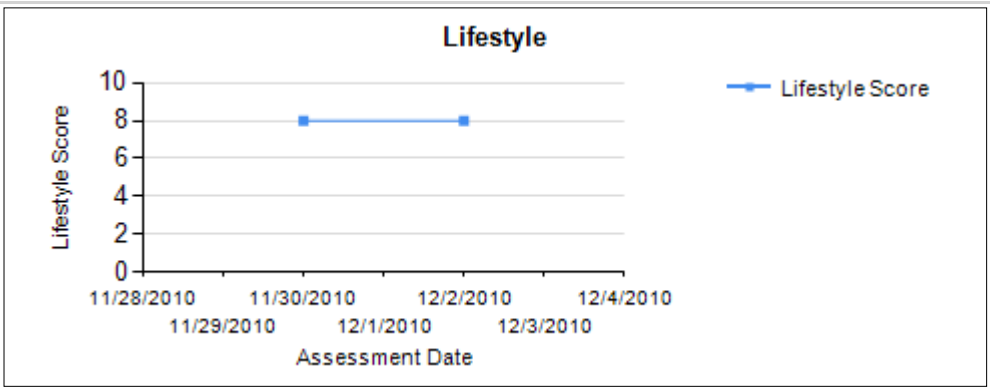
Name: **TIM KELLY**

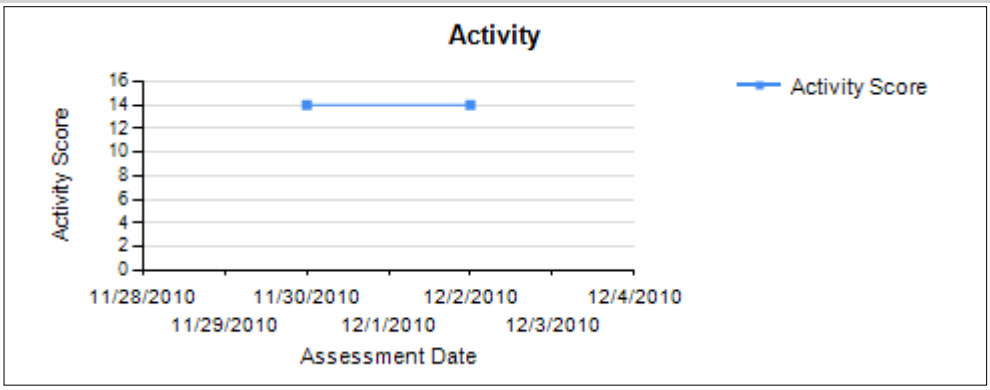
Your last instructor was GABSO BOYNA

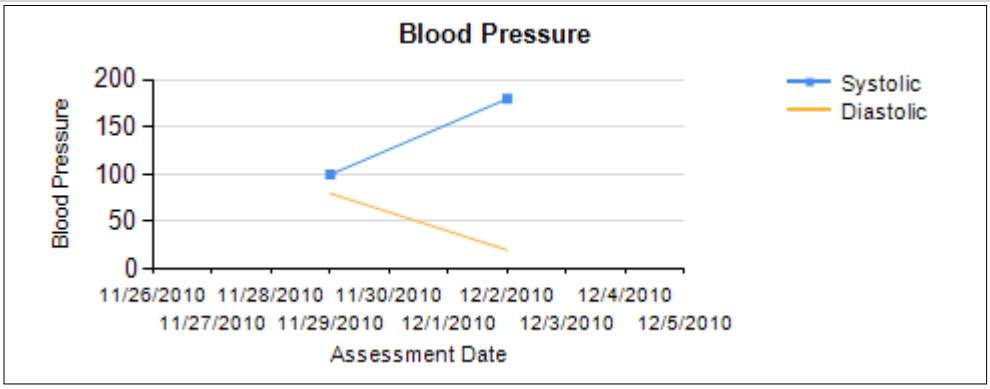
and your last assessment was on 02-Dec-2010

Good Health Goals

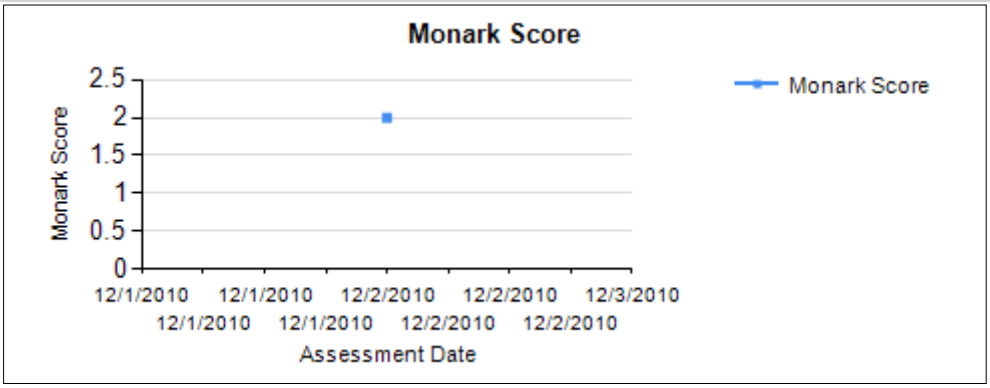


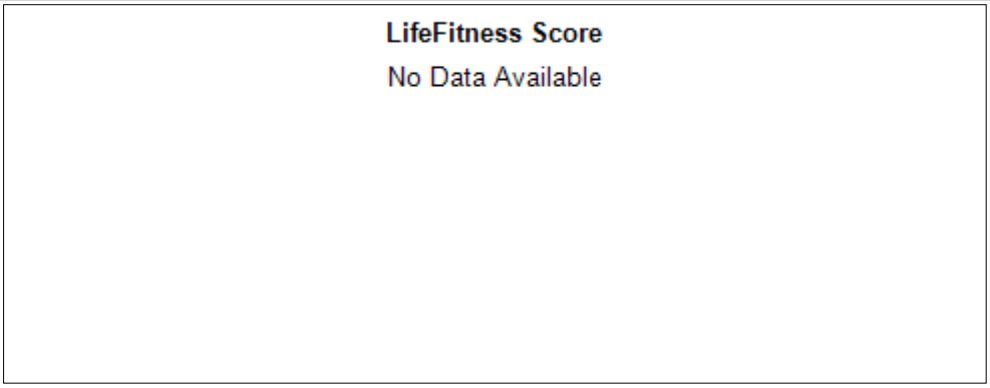




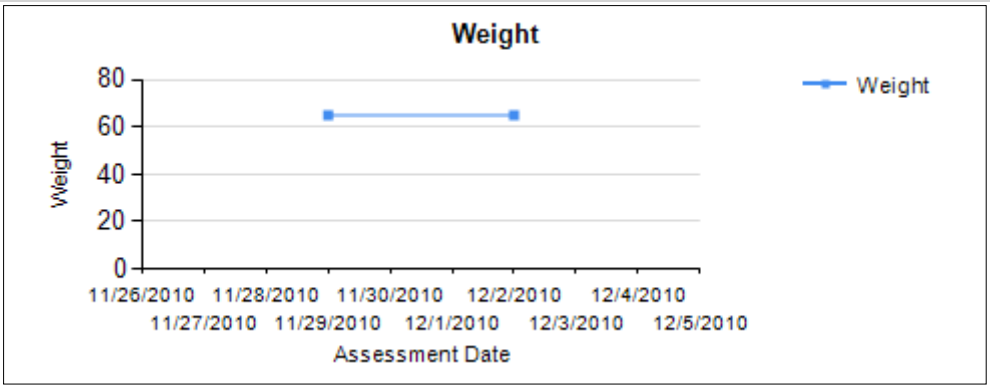


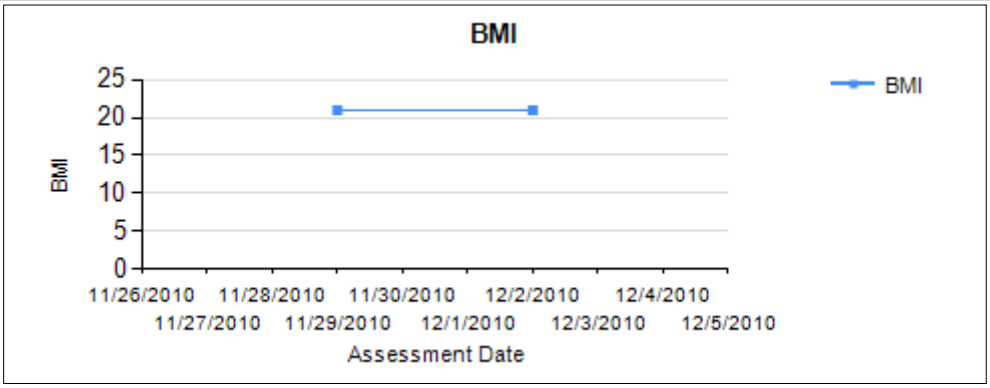
Improve Aerobic Fitness

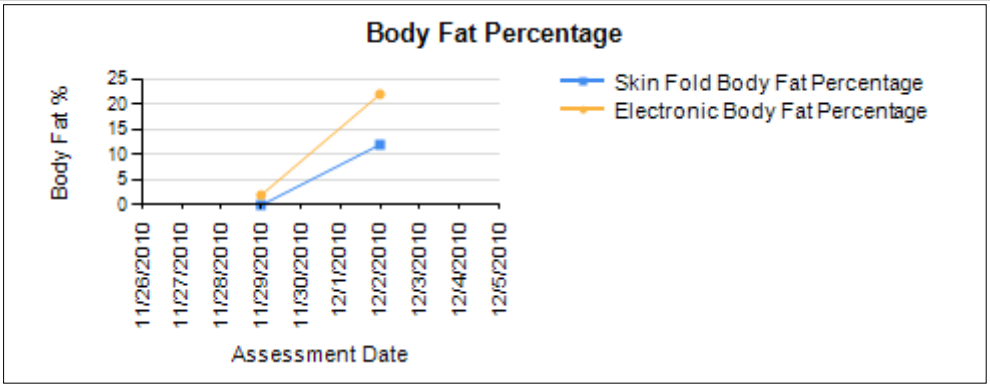


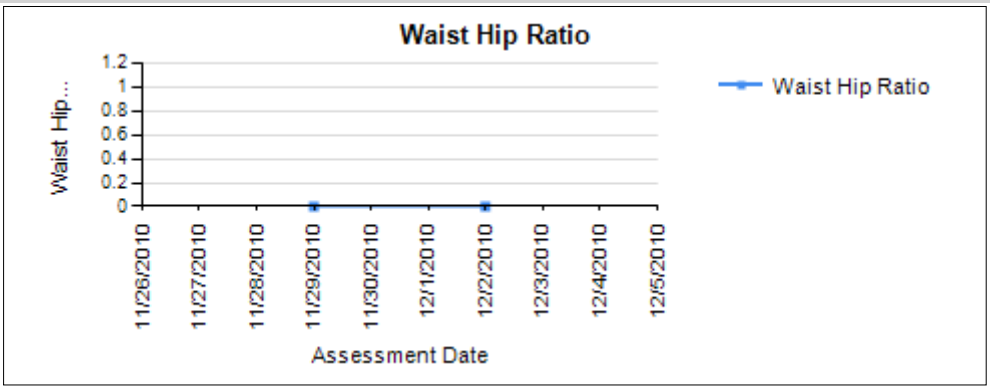


Body Fat Reduction

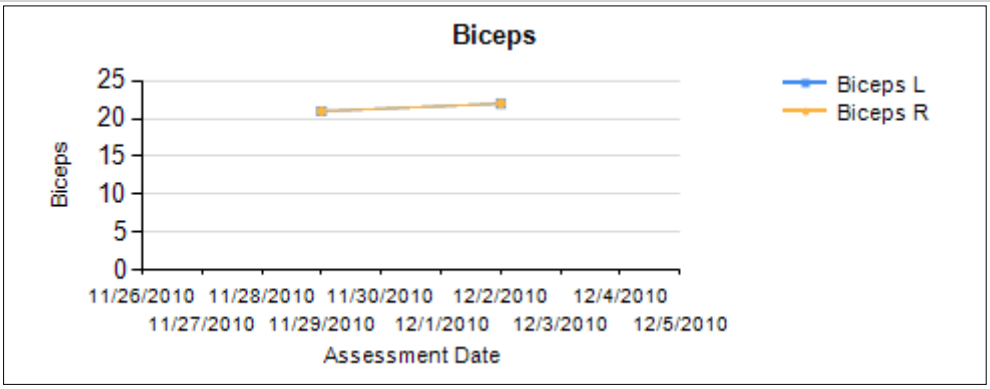


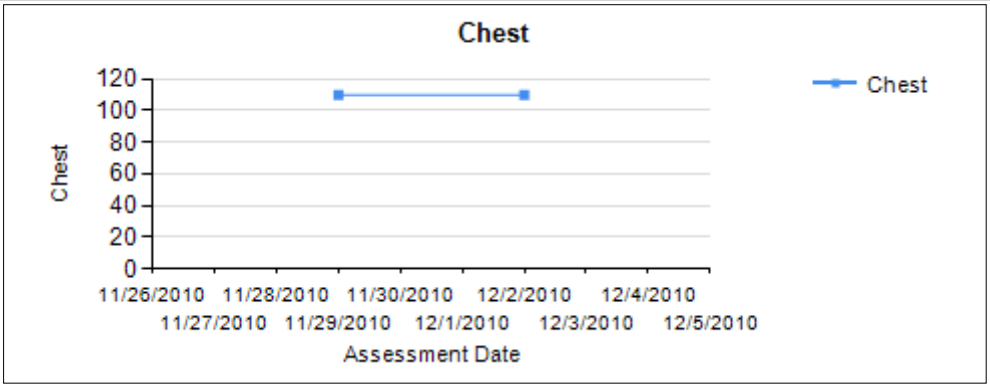


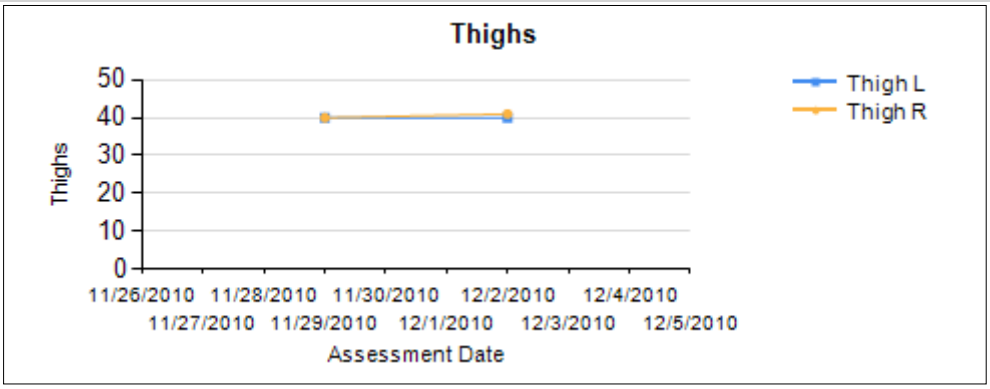




Muscular Development




Chest
120
100
80
60
40
20
0
Chest
11/26/2010
11/27/2010
11/28/2010
11/29/2010
11/30/2010
12/1/2010
12/2/2010
12/3/2010
12/4/2010
12/5/2010
Assessment Date
Chest


Thighs
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40
30
20
10
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Thighs
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11/29/2010
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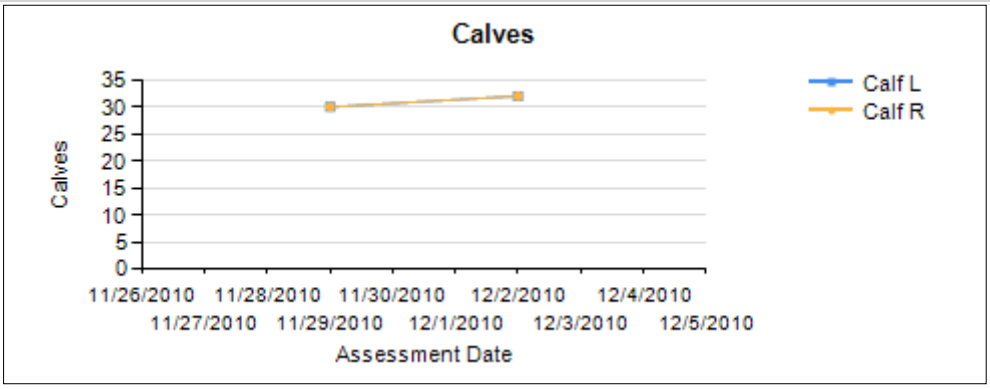
12/3/2010
12/4/2010
12/5/2010
Assessment Date
Thigh L
Thigh R


Calves
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25
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Calves
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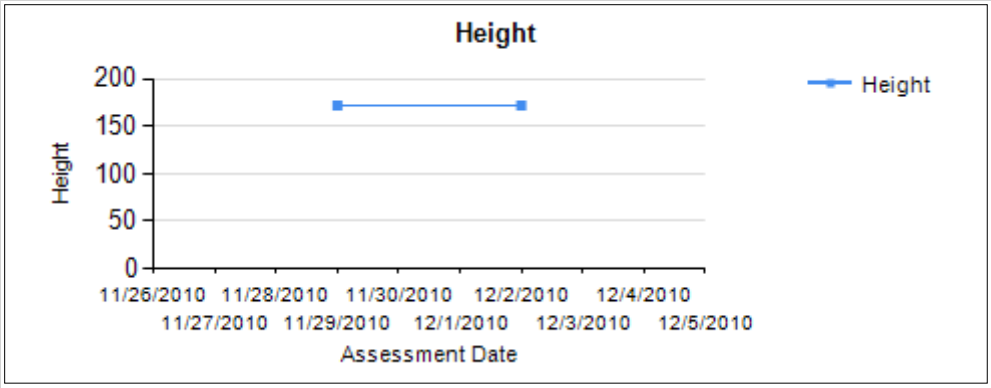
12/3/2010
12/4/2010
12/5/2010
Assessment Date
Calf L
Calf R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Height
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11/27/2010
11/28/2010
11/29/2010
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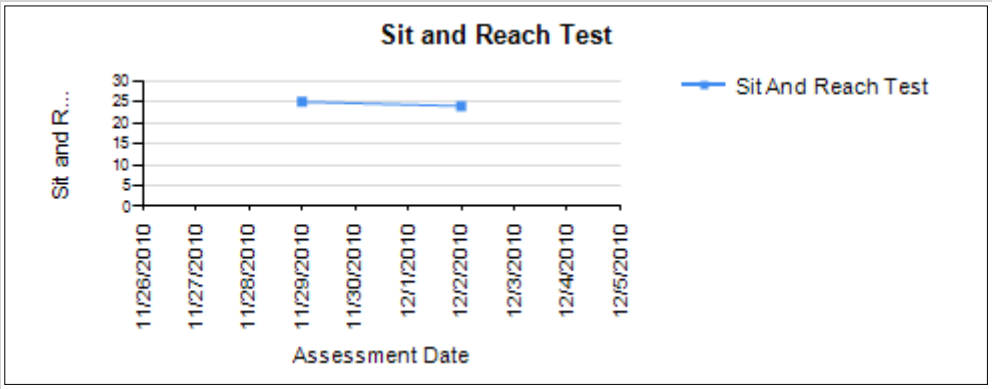
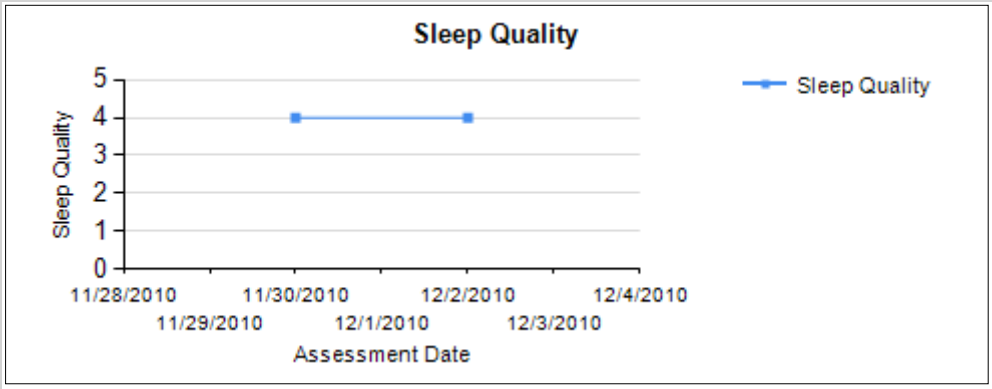
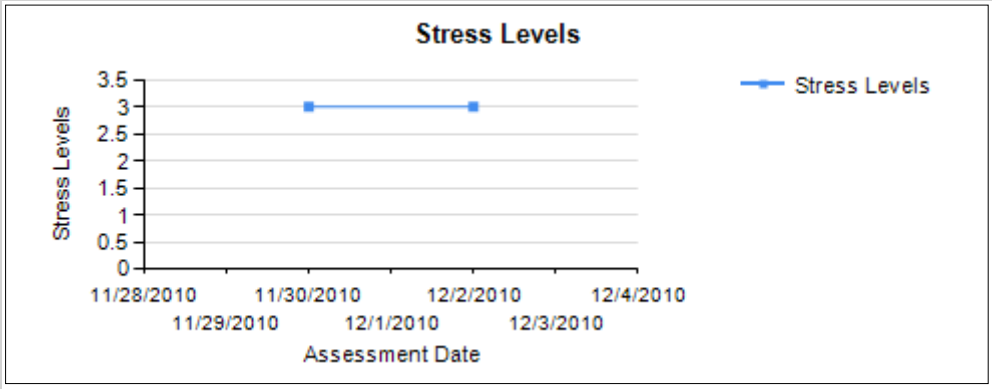
12/1/2010
12/2/2010
12/3/2010
12/4/2010
12/5/2010
Assessment Date
Height

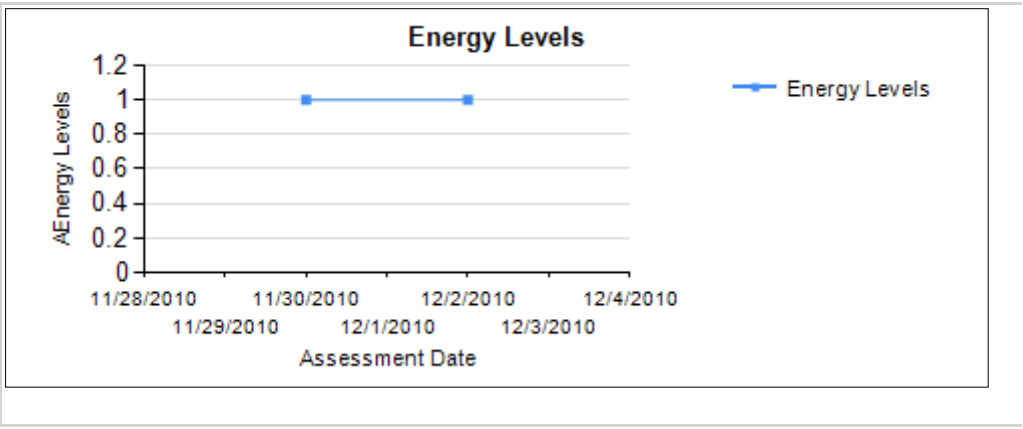
Improve Flexibility



Stress Relief



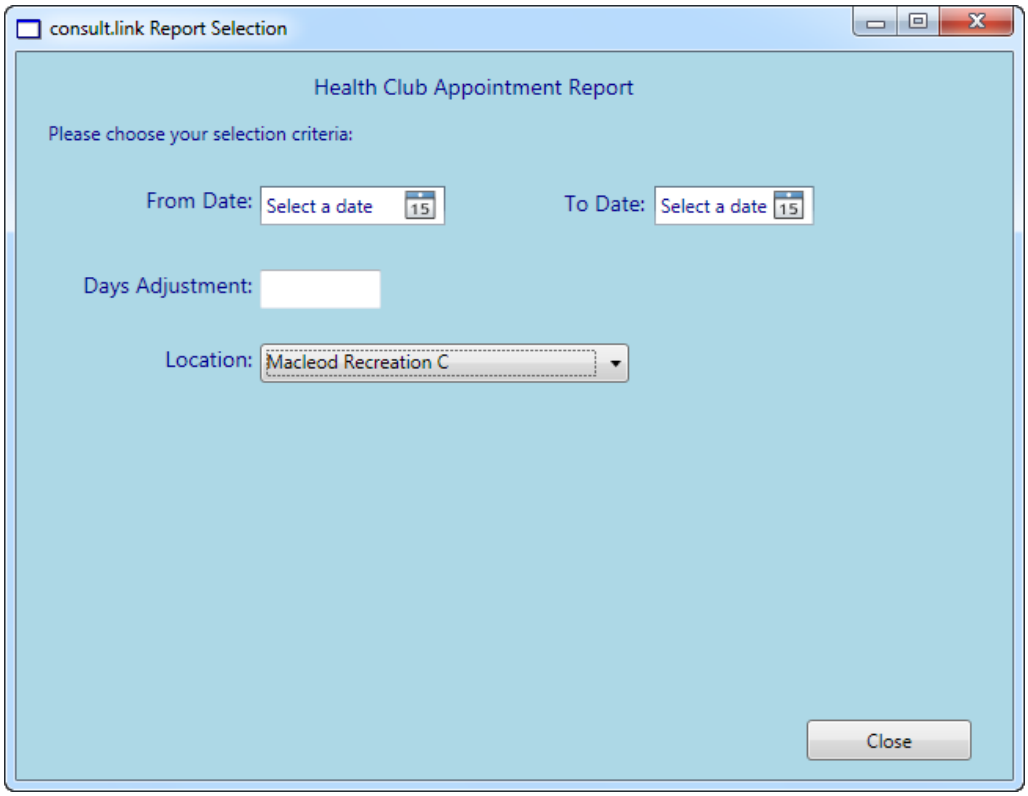




*** End of Customer Assessment Summary ***

Health Club Appointment Report

The health club appointment report is used to view the amount of members whom once signing up have booked and attended a health assessment.



- From Date: beginning date of viewing period
- To Date: final date of viewing period
- Days Adjustment: this refers to the amount of days 'grace' to apply to the viewing period, where assessments booked has not been counted. This would be applied where one would assume that becoming a member and attending an assessment on the final day of the viewing period is not feasible
- Location: refers to the site to report on, in cases of multi-location databases

This report displays the total number of assessments completed during a given period, the percentage of new members who booked and completed their first health check and the average time between these members being reassessed during the reportable period.

Health Club Appointment Report

for Assessments between and

at Location:

Assessment #	Total
Total Nbr Initial Assessments	1
Total Nbr ReAssessments	0
Total Nbr Assessments	1

New Members	Percentage (%)
Percentage New Members with Initial Assessments	0
Percentage New Members with ReAssessments	0

Average Time	Days

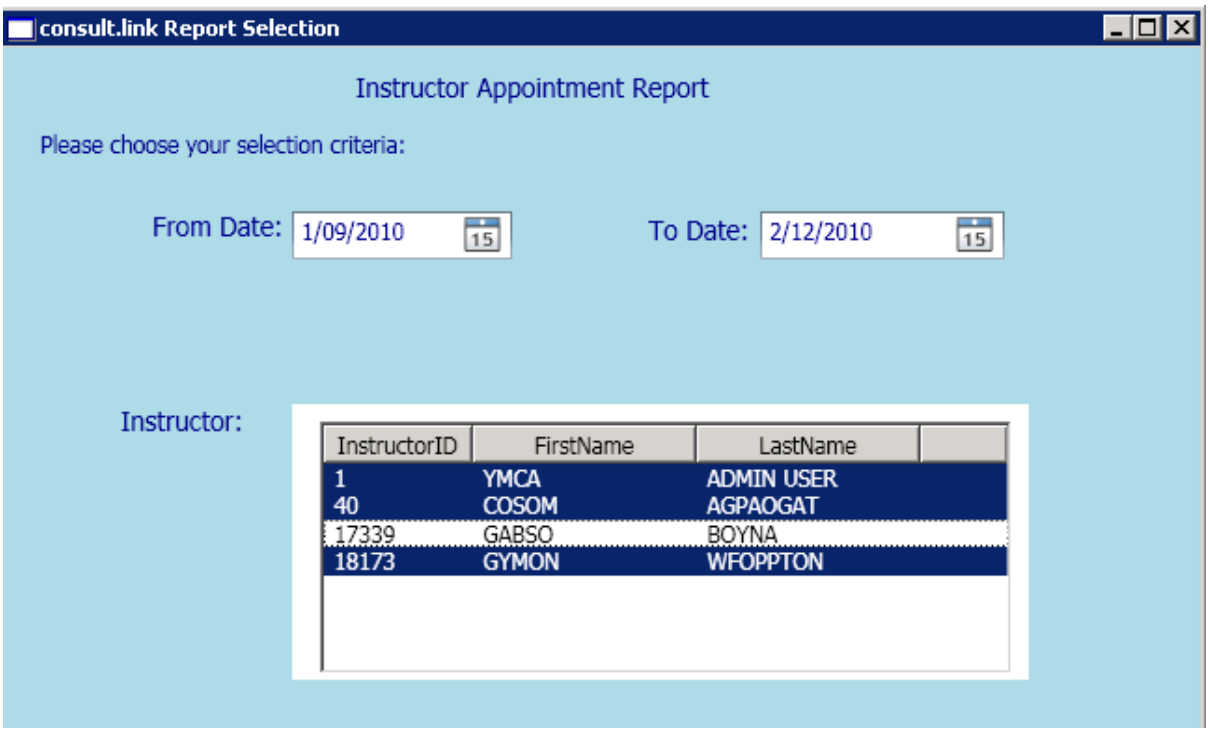
Note: The above results have been calculated using only the Assessments that are in the Date Range selected.

Instructor Appointment Report

This report is used to determine the amount of clients that an instructor has seen during a given period of time.

- From Date: beginning date of viewing period
- To Date: final date of viewing period

You can choose multiple Instructors by holding Shift or Ctrl and click the names



Instructor Appointments Report

for Assessments between 01-Sep-10 and 02-Dec-10

ID	Firstname	Lastname	Total Nbr Assessments	Nbr Initial Assessments	Nbr ReAssessments
1	YMCA	ADMIN USER	1	1	0
40	COSOM	AGPAOGAT	1	1	0
18173	GYMON	WFOPPTON	1	1	0

Selected Instructors: YMCA ADMIN USER,COSOM AGPAOGAT,GABSO BOYNA,GYMON WFOPPTON

Note: The above results have been calculated using only the Assessments that are in the Date Range selected.

*** End of Report ***

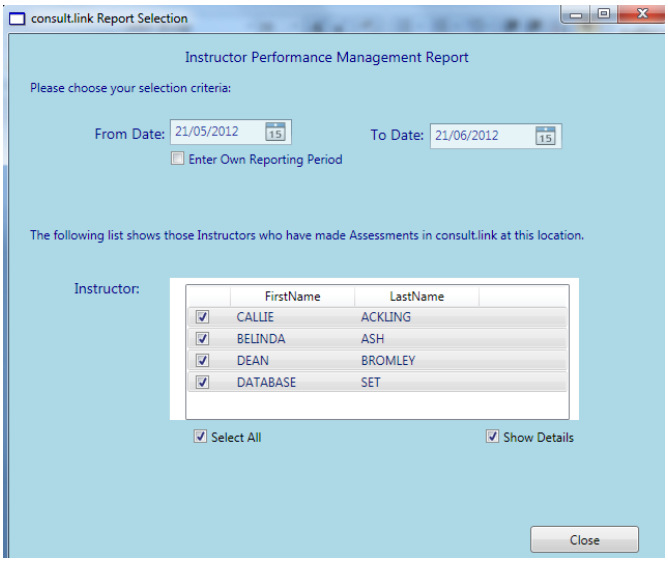
Instructor Performance Management Report

This report provides a summary and analysis of the performance of the instructors.

- From Date: beginning date of viewing period
- To Date: final date of viewing period

Choose multiple Instructors by ticking the check box before the names or use the Select All feature

Select the Show Details check box for the report to display the names of the customers and assessment performance.



Instructor Summary Totals

ID	Instructor First Name	Instructor Last Name	Total Assessments	Total Customers	Number ReBooked Any Instructor	Number ReBooked This Instructor
1	DATABASE	SET	0	0 (New: 0 ReBooked: 0)	N/A	N/A
22	CALLIE	ACKLING	1	1 (New: 1 ReBooked: 0)	N/A	N/A
28	DEAN	BROMLEY	0	0 (New: 0 ReBooked: 0)	N/A	N/A
42	BELINDA	ASH	1	1 (New: 1 ReBooked: 0)	N/A	N/A

Customer Details

The following table, shows all the customers that have made assessments within the reporting period. This includes both new customers and those that have rebooked, grouped by Instructor.

ID	First Name	Last Name	New	ReBooked Any Instructor	ReBooked This Instructor	ReBooked	Avg Days Between Assessments
CALLIE	ACKLING	(22)					
29017	KHADRA	ABDI	Y			N	
BELINDA	ASH	(42)					
29173	SAM	AGOSTA	Y			N	

Report Explanation

Summary Totals Description

Total Assessments:	Total number assessments made in this reporting period.
Total Customers:	Total number of customers receiving assessments within this reporting period. This includes New and Rebooked customers.
Number ReBooked Any Instructor:	Number customers that have rebooked, regardless of who the instructor was in their previous assessment.
Number ReBooked This Instructor:	Number customers that have rebooked, and their previous assessment was also booked with this instructor.
Percentage ReBooked Any Instructor:	(Number ReBooked with Any Instructor / Total Number Customers) * 100
Percentage ReBooked This Instructor:	(Number ReBooked with This Instructor / Total Number Customers) * 100

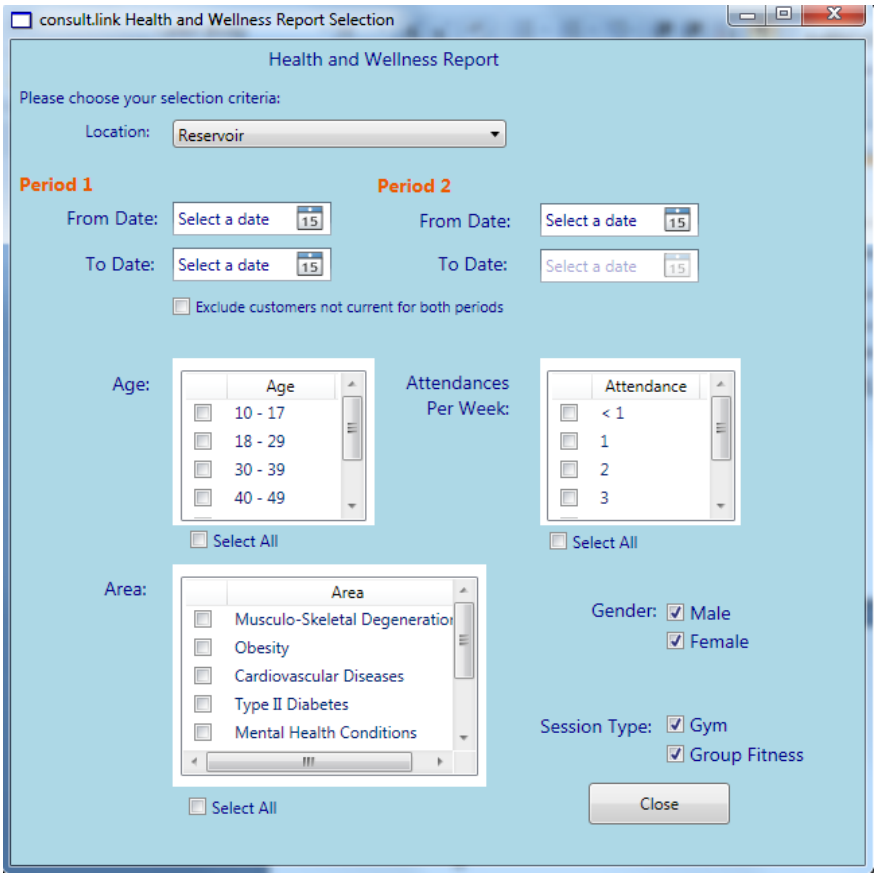
Health and Wellness Report

This report is designed to gauge the performance of the YMCA's impact on Health & Wellness within the community. This report has been designed to the specifications of the Victorian YMCA based on the requirements of the Health & Wellness taskforce.

The report tracks the changes between Health & Wellness goals between two periods. It is designed to show the difference in areas across the date ranges depending on the section criteria used.

For example specific campaigns may have been run to get Men over 50 to reduce their risk of Type 2 Diabetes by attending the facility at least twice a week.

If you select for this report the selection criteria below;

- Select for example March 1st – June 30th 2012 for Period 1
- Select for example March 1st – June 30th 2013 for Period 2 (only up to the current date)
- The age brackets over 50
- Attendance 2,3 etc
- Select MALE gender only and select
- Type II Diabetes as the area

You will then get a report that shows the impact of the Type II Diabetes risks on each of the subsets of information over the two periods. Hopefully the numbers in second period would be reduced.