

Referral Skills

Advancing fitness industry
client referral skills



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Foreword



The **Referral Essentials Guide** identified the priorities and fundamental areas of knowledge for conducting successful client referrals:

1. making the right referral choices;
2. preparing information for an efficient and effective referral process;
3. understanding the expectations of your client and relevant medical and health professionals; and
4. building the confidence to begin developing those relationships.

Attaining **Referral Skills** is the next step to achieving sustainable referral relationships and delivering high quality client care through integrated health and fitness services. The skills described within this resource are not specific to the fitness industry but are also required by professionals within general practice, physiotherapy, chiropractic, osteopathy, exercise physiology, sports medicine, dietetics, podiatry, psychology, and other allied health and specialist professions across the healthcare system.

Referral Skills provides deeper knowledge and capability to exercise professionals and fitness businesses that are already undertaking client referral activities and are ready to advance their levels of connection and collaboration with medical and allied health professionals. The advice within this resource has been compiled through extensive consultation with medical, allied health and exercise professionals who have demonstrated success in developing strong referral networks to deliver positive health outcomes for their clients through evidence-based practice.

Referral Skills, together with the **Referral Essentials Guide** and the supporting **Referral Tools and Templates**, represent a complete referral kit that can be used by exercise professionals and fitness businesses to strengthen and enhance client referral activities.

Craig Knox

General Manager Industry Development



The business case for referral

Quality service delivery and client-centred care are at the heart of primary care services and the foundation of business success. Achieving these aims requires health and fitness professionals to work in partnership so that clients receive the **right care**, at the **right time** to meet their individual needs.

Multi-disciplinary collaboration and improved integration between settings is a common goal across the health and fitness sectors. Not surprisingly, they are also central to many of the recommendations for health system reform and a key strategy for best practice health service delivery.

Developing your **Referral Skills** will expand your opportunities to play an active role in local referral relationships and in turn increase referrals coming your way.

A framework for quality

The Australian fitness industry operates under a system of voluntary regulation. The system aims to safeguard the health and interests of people using fitness services and to provide standards and policies that will promote best practice across professional and business services. The regulatory mechanisms in place include a national **Fitness Business Registration Scheme** and the national **Register of Exercise Professionals**, which are governed and administered by Fitness Australia. As the national Health and Fitness Industry Association, Fitness Australia has both a mandate from the industry, and recognition from government at local, state and federal levels.

Why align to a quality framework?

Across the healthcare system, accreditation of professional practice and alignment with quality frameworks are considered important ways to protect the public. They contribute to:

- safe and high quality standards of service delivery
- management of risk
- workforce skill development and capacity building
- accountability for outcomes

Learning from other sectors: A Quality Improvement Program in General Practice

In the General Practice sector, the Australian Primary Care Collaboratives (APCC) Program helps General Practitioners and other primary health care providers work together to promote a culture of quality improvement and improve patient outcomes through training, education, shared learning and support systems.

[🔗 Read about bright ideas for improvement in the primary health practice environment.](#)

The fitness profession does not fall under the [🔗 Health Practitioner Regulation National Law](#). However in order for exercise professionals and fitness businesses to be a legitimate partner in preventive health and health care, it is recognised that the sector must demonstrate its commitment to quality including benchmarking, measuring and improving performance over time.

These are especially vital steps towards the shared goal of reducing the incidence of chronic disease, overweight and obesity among the Australian population. The [🔗 UK National Quality Assurance Framework \(NQAF\) for Exercise Referral Systems](#) is an example of a system approach to referral, based on quality criteria.

Industry reputation: the foundation for referrals

High quality and consistent service delivery and communication are the foundation of referral practice.

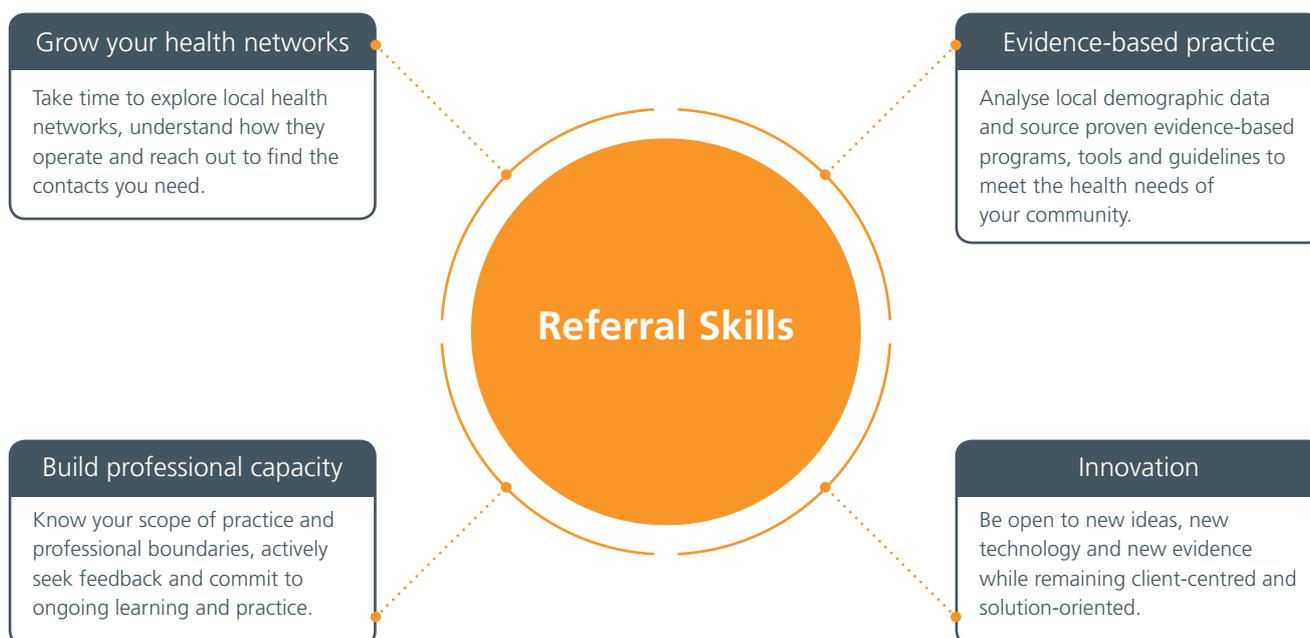
The development and implementation of evidence, tools and resources that will enhance the quality of fitness services is an ongoing priority for Fitness Australia. This national focus will help the industry to achieve improved recognition by government, health professionals and broader health networks. Policies and guidelines developed by Fitness Australia can be found in the Resource Library at

[🔗 www.fitness.org.au/guidelines.html](#).

Referring practitioners will expect assurance that your services are both safe and of a high quality because the outcome of the referral will ultimately reflect back on their own reputation and duty of care. Following nationally recognised best practice standards will afford fitness providers with a sound basis for medical and allied health referrals to their programs and services.

Referral skills map

Advancing your skills for successful referrals



Referral Outcomes

Building these Referral Skills will help you achieve:



Building your referral skills

Grow your health networks

- Research local networks.
- Find the referral contacts you require to meet the needs of your clients.
- Broaden your client demographics and increase the number and diversity of the referrals in to your services.

Resources

🔗 [Health reform](#), 🔗 [Exercise and health referral networks](#)

Building a supportive professional network requires ongoing effort and thinking laterally about how you can make the connections you need. Even one valued relationship can open the door to a broader network of higher level specialists. Begin with the following actions:

Explore

- Get to know the professionals that are geographically close to you – consider your own existing trusted medical or allied health providers.
- Ask like-minded colleagues or family and friends to invite you to join their own network of professionals.
- Refer to your Medicare Local, Local Council, local Community Health Service or Aboriginal Medical Service – they may have an integration or liaison contact whose job is to create links between professionals in different disciplines for the benefit of the client/patient.
- Seek local contacts from peak health and chronic disease non-government organisations.

Understand

- Know the local health priorities of your area and where your services compliment and address needs.
- Learn about the professional realities of sectors you wish to connect with (working hours, time commitments, and communication channels).
- Understand the professional focus and scope of practice boundaries of the health professions you need to connect with, as well as the structure of relevant peak health bodies or industry associations.
- Monitor relationships to prevent break down if key contacts leave or change roles (e.g. Practice Managers, Local Council, Community Health or Medicare Local staff, Health Organisation contacts).

🔗 **[Refer to Appendix 1: Health reform and referral relationships](#)** for more information about Medicare Locals and how they can support the growth of your health network.



Reach out

- Look for professional or community services directories you can refer to or be listed in.
- Identify your Medicare Local or Community Health newsletter and opportunities to be listed or profiled.
- Attend local inter-professional events or education – aim to connect with key professionals from the full range of medical, allied health and chronic disease sectors.
- Set up an appointment to meet with a practice manager or attend staff meetings at a medical or allied health practice – offer to provide an overview or information session about your services and programs or recent research in the fitness field.
- Ask local health practitioners to run professional development sessions or information sessions about what they offer for you your clients and your business – remember they want to increase their referral base as well!
- Accompany your client to a GP or allied health appointment (with permission).
- Consider offering complimentary sessions to medical and allied health professionals to give them first-hand experience of your facilities and services.

Having your services listed in directories that are referred to by doctors or allied health professionals will make you easier to find and refer to. Consider the following:

Service listings and directories

National Health Services Directory (NHSD)

- Service provider information for GPs, Pharmacies, Hospitals and Emergency Departments.
- Over time, secure access to practitioner information, mental health and allied health service providers and local hospital services will be available.

Healthy Living Network

- Programs and service providers that have been assessed and registered against the Healthy Communities Quality Framework standards and criteria
- This includes Lift for Life and other evidence-based program providers.

Healthy Workers Portal

- Resources and links to workplace health programs that focus on decreasing rates of overweight and obesity, increasing levels of physical activity and intake of fruit and vegetables, smoking cessation and reducing harmful levels of alcohol consumption.

Your Medical Local

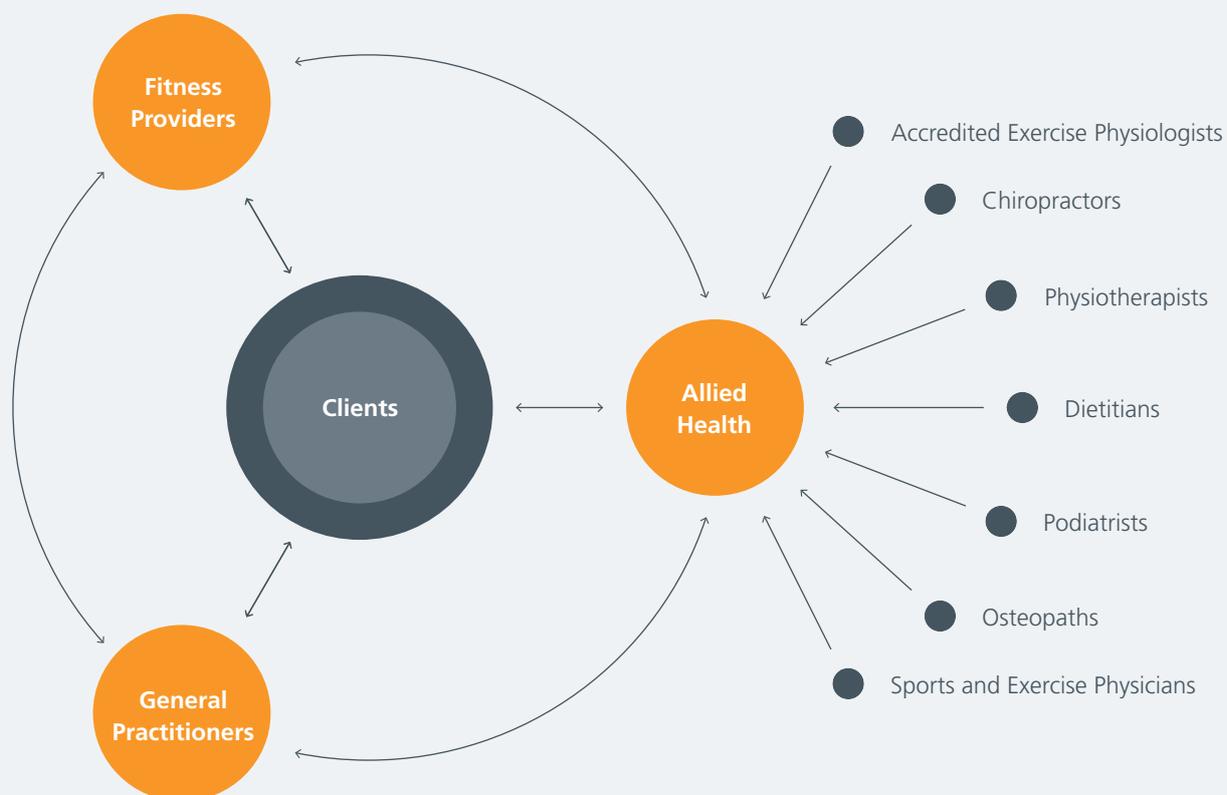
- Most Medicare Locals will have a local service provider listings that are an important source for GPs and other health professionals to find fitness service providers to refer to
- Find out which Medicare Local your business or services will fall under at and get in touch.

Infoexchange Service Seeker (ISS)

- An extensive electronic health and welfare directory providing over 290,000 records of community agencies and services and data for over 80 national government and community websites and portals.

 **Refer to Referral tools and templates 5: Exercise and health referral networks** to help you set priorities for connecting with relevant peak bodies and health organisations.

Collaborative client care



Evidence-based practice

- Source evidence-based programs, assessment tools and practice guidelines.
- Record and use relevant client health indicator and population demographic data.
- Commit to high quality and consistent service delivery and communication.

Resources

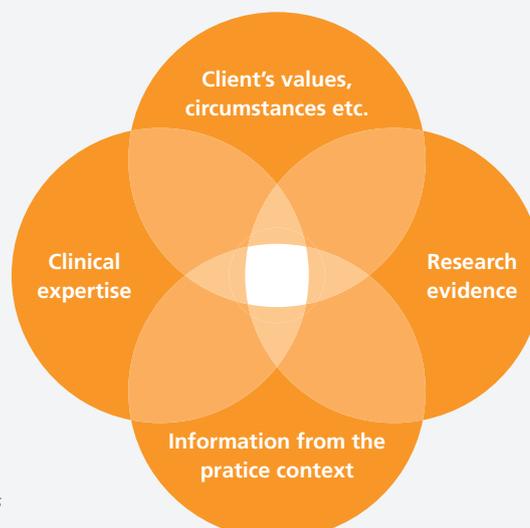
🔗 [Evidence-based practice resources](#), 🔗 [APSS Tool](#), 🔗 [Exercise and health referral networks](#)

The ability to access and interpret evidence are fundamental skills in health care delivery and the foundation of evidence-based decision making — a practice that is common to all health professions. If the fitness industry is to contribute to multi-disciplinary healthcare, it must build these skills as a priority and demonstrate a commitment to data collection and the analysis of evidence and health outcomes.

Evidence-based practice does not remove the need for experience or professional judgement. In fact, by definition, it signifies practice informed by professional judgement that is based on the ‘coming together’ of current best evidence from:

- Well controlled research (such as those accessed through databases of peer reviewed journals).
- Experience from clinical practice.
- The needs and values of the client (e.g. health status, risk factors, history, goals).

Defining evidence-based practice



Hoffman, T., Bennett, S., & Del Mar, C. (2010). *Evidence-based practice across the health professions* (2nd ed.). Chatswood, NSW: Elsevier.



The importance of data and evidence

To develop exercise programs or deliver advice based solely on tradition, past education, past experiences or the experiences of colleagues or friends may have you run the risk of client injury or litigation. Knowledge from basic science, professional practice and expert opinion are forms of evidence. However, developing the capacity to translate research evidence into practice will assist the fitness industry in strengthening its service delivery and gain credibility with medical and health professionals. The use of appropriate health terminology and language will also contribute significantly to a positive industry reputation and effective referral relationships across the board.

Medical and allied health professionals will have more faith in you and will be more inclined to refer to your services, if they know they are safe, effective and based on sound evidence — much the same as any of the other prescriptions they might make for pharmaceuticals or specialist treatments.

Evidence-based practice will help you build your client referral relationships through enhanced:

Credibility

- Deliver services that have positive proven outcomes.
- Source evidence-based programs and assessment tools.
- Demonstrate how the programs you deliver are in line with accepted evidence, clinical guidelines or best practice principles.
- Demonstrate your understanding of the expectations of health professionals, e.g. know what evidence-based guidelines GPs referring to in relation to exercise and physical activity prescription, or chronic disease prevention.
- Stay abreast of current guidelines to ensure that your clients benefit from the research evidence as it evolves.
- Subscribe to reputable journals or evidence-based news updates.

Data analysis

- Track, monitor and report on client health indicators and functional health outcomes.
 - Know which health indicators are of interest to your client and the professionals you need to refer to (e.g. attendance rates, weight loss, blood pressure reduction).
 - Use the [🔗 APSS Tool](#) to provide a context for the collection of lifestyle markers that will be relevant to other professionals, especially GPs.
 - In addition to traditional health indicators, consider indicators such as client empowerment, health-related quality of life, well-being indexes, confidence, self-efficacy, self-management skills and other psychological and social outcomes when evaluating your referral initiatives.
- Understand the demographics of your local area (e.g. age range, population size, socio-economic status) and how your service meets its needs.
 - In addition to reporting individual client results, it's also important to collect and report aggregate, de-identified data (totals and averages across your client base) that can demonstrate the impact you are having on your local community (e.g. the range of health conditions you deal with, the improvements you have seen over time).
 - Link and compare your client demographics and results to that of your local area or national data.
 - Present the evidence that shows the impact you are making against local and national health priorities.
 - Peak health and chronic disease non-government organisations will have data available in relation to condition prevalence and risk factor rates and population demographics.

The Australian Government Department of Health and Ageing provides evidence-based information for health professionals addressing how to educate consumers about healthy living and promote disease prevention activities. Refer to the following example:

[*🔗 Clinical Practice Guidelines for the Management of Overweight and Obesity: a Guide for General Practitioners*](#)



“What gets measured gets improved.”

– Robin S. Sharma

Health data, information and systems

Australian Institute of Health and Welfare (AIHW)

- National agency for health and welfare statistics and information.
- Reports, publications, journal articles and discussion papers are available at the website.

Australian Bureau of Statistics (ABS)

- Provides high quality, objective and responsive national statistical data and reports.
- Key contributor to national health decision-making, research and discussion.

Public Health Information Development Unit (PHIDU)

- Provides public health data, health indicators and information on health determinants.
- Website includes quick links to national and local data and reports, including post code search.

BEACH Program (Bettering the Evaluation and Care of Health)

- Collects information about the clinical activities in general practice in Australia each year.
- Includes GP and patient characteristics, reasons people seek medical care, problems managed, medications or clinical treatments prescribed, referrals provided and tests ordered.

Your Medicare Local

- Every Medicare Local will have a local Population Health Needs Analysis that will give you vital information about the health of your local community.
- Find out which Medicare Local your business or services will fall under at and get in touch.

Refer to Appendix 1: Health reform and referral relationships for more information about Medicare Locals and how you can access local health data.

Refer to Appendix 2: Evidence-based practice resources for links to evidence-based guidelines, education, programs and information sources.

Refer to tools and templates 5: Exercise and health referral networks for guidance about evidence-based information sources from relevant peak bodies and health organisations.

Build professional capacity

- Know your scope of practice and professional boundaries.
- Commit to ongoing learning, seek feedback and set goals for filling gaps in knowledge.

Resources

🔗 [Scope of practice](#), 🔗 [Evidence-based practice resources](#), 🔗 [Exercise and health referral networks](#), 🔗 [Referral essentials checklist](#), 🔗 [Referral skills checklist](#)

'Building professional capacity' means upgrading the skills and improving the practices of service providers to respond to the needs of the clients and communities they serve.

For the fitness industry to be recognised as a part of the exercise referral pathway, professionals need to be delivering services in line with accepted practices and working collaboratively. A commitment to learning and advancing skills is essential in developing efficient, responsive and adaptable services and the capacity to work as part of a multi-disciplinary team.

To improve referral outcomes, workforce capacity should be developed with a focus on the following:

Professional boundaries

- Ensure that referred clients are managed by appropriately qualified/experienced professionals.
- Ensure all services delivered are within scope of practice.
- Aim for a balanced set of skills within your team to best meet client needs.

Training and development

- Evaluate your learning needs and identify gaps in knowledge and skills.
- Build a high level of skill in referral processes, record keeping and reporting.
- Put in place internal training plans and system supports.
- Provide leadership and support for staff to practice new skills and implement new processes.
- Look for sources of education and tools that are consistent with the professions you wish to engage with.

Connection and feedback

- Observe professionals from other sectors in practice and note what systems and language they use.
- Invite other health professionals to take part in your services so that you may learn from each other and respond to feedback in a practical setting.

🔗 **Refer to Referral Tools and templates 4: Scope of practice** for clarification about the professional boundaries of a Registered Exercise Professional.

🔗 **Refer to Appendix 2: Evidence-based practice resources** for links to evidence-based guidelines, education, programs and information sources.

🔗 **Refer to Referral Tools and templates 5: Exercise and health referral networks** to help you set priorities for education and capacity building activities.

Refer to the following checklists to help you evaluate your learning needs and identify gaps in knowledge and skills:

🔗 **Referral Tools and templates 2: Referral Essentials Checklist.**

🔗 **Referral Tools and templates 9: Referral Skills Checklist.**

Remember: 🔗 *Your Medicare Local may be able provide access to or suggestions for local inter-professional networking and education relating physical activity or exercise promotion, evidence-based practice, health literacy, health record-keeping and reporting, or other knowledge areas relevant to client referral.*

Innovation

- Be flexible and open to sharing ideas, experimenting and receiving feedback.
- Stay up to date with new technologies and new evidence.
- Remain client-centred and solution-oriented.

Resources

🔗 [Health reform](#), 🔗 [Evidence-based practice resources](#), 🔗 [Exercise and health referral networks](#)

In this period of health reform, government attention has begun to shift towards prevention. Models of client care are being redesigned, making new pathways and processes for collaboration between health and fitness professions vital to supporting client referral.

The fitness industry is a fast paced sector, with existing skills that help it adapt to changes in client demands and available resources. Applying these skills to staying abreast of health system changes and exploring new opportunities in service delivery will create a solid foundation for expanding medical and allied health referral relationships. True collaboration requires a commitment to undertake the following:

Share ideas

- Explore the use of new technologies and platforms to share referral information and ideas (e.g. Skype, social media, secure messaging and data transfer).
- Engage professionals from other sectors.
- Always seek feedback and take time to review the outcomes of changes that are implemented.

Focus on quality solutions

- Remain passionate and flexible.
- Use a client-centred approach.
- Consider how your information management systems, business processes or human resources (people!) might need to change in order to ensure:
 - Client data is collected in a systematic manner, is accurate and up to date.
 - Client or health professional language and communication is consistent and precise.
 - Client scheduling is efficient and effective (clients are booked to see the right people, receive reminders and instructions efficiently and feel informed and supported).
- Look for opportunities to collaborate based on identified needs.
- Look for quality markers that you can use for comparison and analysis in business monitoring – consider how you can measure the safety and effectiveness of your services?

Stay up to date

- Allow time for learning and quality improvement.
- Refer to relevant research.
- Attend key events/conferences.
- Look for learning sources from the sectors you wish to collaborate with.
- Subscribe to cross-discipline evidence-based news updates that will ensure you stay up to date with changes in the health sector.

🔗 **Refer to Appendix 1: Health reform and referral relationships** for links to more information about health reform.

🔗 **Refer to Appendix 2: Evidence-based practice resources** for links to evidence-based guidelines, education, programs and information sources.

🔗 **Refer to Referral Tools and templates 5: Exercise and health referral networks** to help you set priorities for sharing ideas and seeking feedback.

Refer to the following checklists to set targets for making improvements to systems and processes:

🔗 **Referral Tools and templates 2: Referral Essentials checklist.**

🔗 **Referral Tools and templates 9: Referral Skills Checklist.**

Learning from other sectors: managing change

The Australian Primary Care Collaboratives (APCC) Program (a quality improvement program in general practice) recognises that making improvements to products, systems or services requires change, which can seem threatening or overwhelming for busy professionals. The APCC program is based on the premise that industry change can be achieved through well planned, focussed and systematic processes, and asking:

- What are we trying to accomplish?
- How will we know that a change is an improvement?
- What changes can we make that will result in an improvement?

🔗 **Read more about The Model for Improvement.**



Referral outcomes

A team approach to client care takes cooperation, time and effort, commitment to ongoing learning and attention to the ever changing health and fitness landscape. The development of **Referral Skills** that will cultivate a collaborative professional culture will help to position the fitness industry as a legitimate partner in promoting healthy living and preventive health.

The **Referral Skills** outlined in this resource deal with your knowledge, attitudes and language, and how you set business or professional priorities.

Your success will be measured by the strength of your network: the medical and allied health professionals you have available to refer to, or receive referrals from, in the course of your day-to-day work. However ultimately your client referral outcomes will be dependent upon your capacity to operate with integrity and to build the trust and confidence of your clients and the health professionals you deal with.

Building your **Referral Skills** will help you achieve the following for your clients, your business and your professional relationships:



Referral skills checklist

Advancing your skills for successful referrals

✓ Grow your health networks

- Take time to explore local health networks and understand how they operate
- Commit to new ways of reaching out to find the referral contacts you need and help them to find you
- Consider how your services can be tailored or promoted to meet the needs of a more diverse client base

🔗 [Health reform](#)

🔗 [Exercise and health referral networks](#)

✓ Evidence-based practice

- Source evidence-based programs, assessment tools and practice guidelines
- Record and use client health and local community demographic data that is relevant to the health sector
- Deliver services that have positive proven outcomes and show how they meet the health needs of your community

🔗 [Evidence-based practice resources](#)

🔗 [APSS Tool](#)

🔗 [Exercise and health referral networks](#)

✓ Build professional capacity

- Know your scope of practice and professional boundaries
- Analyse the skills required to meet the needs of your clients
- Commit to ongoing learning and practice
- Seek feedback and set goals for filling gaps in knowledge

🔗 [Scope of practice](#)

🔗 [Evidence-based practice resources](#)

🔗 [Exercise and health referral networks](#)

🔗 [Referral essentials checklist](#)

🔗 [Referral skills checklist](#)

✓ Innovation

- Be flexible and open to sharing ideas, experimenting and receiving feedback
- Remain client-centred and solution-oriented
- Stay up to date with new technologies and new evidence
- Benchmark, measure and set targets for quality
- Monitor and review the impact of all changes you implement

🔗 [Letter templates](#)

🔗 [Exercise and health referral networks](#)

🔗 [Confidentiality & privacy](#)

Referral outcomes

Building your Referral Skills will help you achieve:



Appendices

Appendix 1: Health reform and referral relationships

Medicare Locals

A key component of the Commonwealth Government's national health reform has been the establishment of a new nation-wide network of [Medicare Locals](#).

They have been tasked with coordinating health care delivery at a local level, tackling service gaps and ensuring that services are better tailored to meet the needs of local communities. In doing so, they will be heavily focussed on building and maintaining strong links between health professionals, service providers, consumers and patients.

Within the context of the national health reform, it's an opportune time for the fitness industry to streamline referral practice and adopt a multidisciplinary team approach that can be supported by Medicare Locals and emerging preventative health networks at a local level, through mechanisms such as:

Membership of Medicare Locals

Health and fitness clubs and businesses may be eligible to be members of Medicare Locals (considered non-traditional health providers) alongside GPs and other health practitioners registered with the

[Australian Health Practitioners Regulation Agency \(AHPRA\)](#).

Directories and service listings

Medicare Local service listings will be an important source for GPs and other health professionals to find fitness service providers to refer to.

They may also enable exercise professionals to be included in discussions, decisions and initiatives to promote physical activity in their local region.

New business opportunities

Medicare Locals can provide access to information relevant to physical activity or exercise promotion that could translate into new business opportunities for the fitness industry, such as:

- local health initiatives, key people and networking opportunities
- education opportunities (e.g. health promotion, health literacy)
- the expectation of the local health sector

Local data

A key objective of Medicare Locals operations will be to undertake annual needs assessments in primary health care which will identify key health priorities and activities for the local community.

[An example of a Medicare Local Needs Assessment](#)

Find out which Medicare Local your business or services will fall under at www.amlalliance.com.au and get in touch.

Medicare team care arrangements

The [Medicare Benefits Schedule \(MBS\)](#) is a listing of the Medicare services subsidised by the Australian government. It is important to understand the context of the MBS and how it relates to allied health professionals. In recent times, the MBS has made it mandatory for health providers eligible for Medicare Rebates (such as physiotherapists, exercise physiologists, dietitians and diabetes educators) to meet specific criteria for two-way collaboration under Team Care Arrangements (TCAs) for patients with chronic conditions.

Under the TCA, the patient can access a maximum of 5 rebatable services per year, which need to be shared between the treating practitioners.

[More information about Medicare Team Care Arrangements](#)

Exercise professionals are not currently eligible for Medicare rebates. However, they can demonstrate commitment to collaboration by understanding health system dynamics and using best practice processes for referral. By making an active contribution to shared decision making and team-oriented provision of client care.



Appendix 2: Evidence-based practice resources

Evidence-based programs, assessment tools and guidelines

Industry and professional guidelines

Peak bodies in fitness, exercise and sports medicine have produced specific, evidence-based guidelines that should be a first point of contact and will often refer to the relevant underlying evidence that might relate to prescription of a particular activity or working with a specific population group:

[Fitness Australia](#)

[Sports Medicine Australia \(SMA\)](#)

[Exercise & Sports Science Australia \(ESSA\)](#)

[American College of Sports Medicine \(ACSM\)](#)

[Adult Pre-Exercise Screening System \(APSS\)](#)

Access the APSS Tool, Textbook, Factsheet and Frequently Asked Questions

[Evidence-based continuing education programs](#)

Programs available to the fitness industry can be found via the national online directory, searchable by condition or population sub-group.

[General Practice guidelines for preventive activities developed by the \[Royal Australian College of General Practitioners \\(RACGP\\)\]\(#\)](#)

RACGP Red Book (Guidelines for preventive activities in general practice)

RACGP Green Book (Putting prevention into practice: guidelines for the implementation of prevention in the general practice setting)

SNAP Guide (preventing lifestyle risk factors of Smoking, Nutrition, Alcohol and Physical activity)

[Clinical Practice Guidelines Portal](#)

Search for a specific condition (e.g. Diabetes) to become familiar with the clinical practice guidelines developed for use across health professions in Australia.

[Primary Health Care Research & Information Service \(PHC RIS\)](#)

PHC RIS provides comprehensive information and evidence about Australian primary health care, and facilitates knowledge exchange and networking through its cross-discipline evidence-based news updates

[Evidence Based Practice Across the Health Professions, 2nd Edition](#)

Resource designed to assist health and fitness professionals to understand and implement evidence-based practice methods and principles

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