metabolic balance

Step-by-Step Checklist

YOUR GUIDE TO COACHING CLIENTS

CLIENT SIGNS UP & COMPLETES MANDATORY FORMS

The client must complete the Personal Profile form (including MD info + client signature) as well as the Consent Form. The Coach must store these mandatory forms in the client files securely and have it available at any time upon request.

PREPARE FOR BLOOD TEST

> Enter client data into the requisition form (no health card number required) and send form to client. > Client needs to fast 8-12 hours prior to the blood test.

LAB SENDS BLOODWORK RESULTS TO COACH

This will look different, depending on where you and your clients are located. Please see the Labs & Blood Work page for more province-specific instructions.

ENTER DATA INTO THE BACK OFFICE

Visit the Back Office via the Coach Hub, or click here to be redirected there. Enter blood results and the client's personal data into the system.

> Don't hesitate to refresh yourself on these steps via our Practical Part videos, or by visiting our Frequently Asked Questions.

VERIFY DATA IN THE BACK OFFICE

Confirm that the data in the Verify Data section is correct before the next step.

COACH REQUESTS THE MEAL PLAN IN THE BACK OFFICE

Once data is submitted in the system, request the plan for your client. Once it's returned, read the plan from cover to cover to avoid any mistakes.

TIME TO COACH!

Coach splits the meal plan into single phases. DO NOT include the coach analysis in the client-facing plan. Once the plan is ready, begin with consultation phases 1 & 2 before moving on to 3 & 4, for a total of 5 coaching hours (minimum).