

# Scope of Practice Worksheet

This worksheet describes the kind of care you can offer to your clients as a coach.

Here, we'll cover what is:

- **Definitely in scope:** What you can confidently do and say as a coach.
- **Definitely out of scope:** What you can't do or say as a coach.
- **Maybe, sometimes, in scope:** What may be appropriate to say or do, depending on the situation and how you approach it.



It also includes a few examples of specific scenarios, along with dialogue for how you could navigate the grey area of those scenarios.

At the end, there are a few key questions you can ask yourself to decide whether you can and should address particular issues with your client, and/or refer to another licensed and qualified professional.

## What is a PN Certified Coach?

**PN coaches help clients lead themselves.**

They identify clients' own existing resources, values, strengths, and capabilities.

Then, they use those to build sustainable skills and daily-life behaviors to reach goals the client seeks.

Using evidence and a deep health model that helps clients to thrive in all aspects of life, PN coaches look to transform lives, not just habits.

## What's in scope for a PN Certified Coach?

### It's not always obvious.

Here's what you can offer clients:

- **General education:** Teaching clients about topics and skills (e.g., nutrition, movement, sleep, stress management, and change) that can improve their deep health and performance, using widely accepted evidence-based information that relates to clients' goals, lifestyle, and values.
- **Goal setting:** Helping clients define and clarify what they want; why they want it; and how this relates to their identities, values, and life priorities.
- **Action planning:** Helping clients break down their goals into practical and specific skills, practices, and actions, then organize them in a concrete plan.
- **Prioritization:** Helping clients identify what they do and don't want, what's most important, and what they're willing to trade off.
- **Mindset awareness:** Helping clients explore any beliefs, ambivalence, and/or concerns around building new routines.
- **Accountability and support:** Helping clients do what they say they want to do. Providing ongoing reminders, support, and neutral third-party perspective for clients' commitments to their goals.
- **Self-awareness:** Helping clients see how behaviors and mindset lead to outcomes, and how other factors (such as environmental cues) shape their behaviors and mindset. Showing how skill domains (i.e., nutrition, movement, sleep, stress management, etc.) connect to one another. Guiding clients through self-experiments to build their own self-awareness (i.e., their Owner's Manual).
- **Being part of a larger care team:** Helping clients coordinate and navigate interactions with other licensed and credentialed care providers such as doctors, physiotherapists, mental health specialists, etc. (E.g., by helping clients increase awareness about their experiences, providing appropriate language, suggesting referrals, etc.)



## What's NOT in scope?

You cannot do these unless you are otherwise formally trained, licensed, and credentialed to do so (e.g., an MD or RD).

### Here are the main areas NOT in scope for a PN Certified Coach:

- **Diagnosing, treating, and/or prescribing for specific medical issues** (e.g., injuries, diseases, post-surgical recovery, etc.)
- **Diagnosing, treating, and/or prescribing for specific mental and emotional health issues** (e.g., eating disorder, PTSD, substance abuse, etc.)
- **Providing advice related to specific medications** or medication-supplement interactions
- **Providing advice on specific medical tests** to assess and interpret health status (e.g., bloodwork, MRI, psychiatric evaluation, sleep lab, genetic tests, etc.)



## What's *maybe, sometimes* in scope?

On paper, in and out of scope is simple. But in real-life coaching, there are many gray areas. These gray areas live in between clear-cut definitions of “definitely in scope” and “definitely out of scope”.

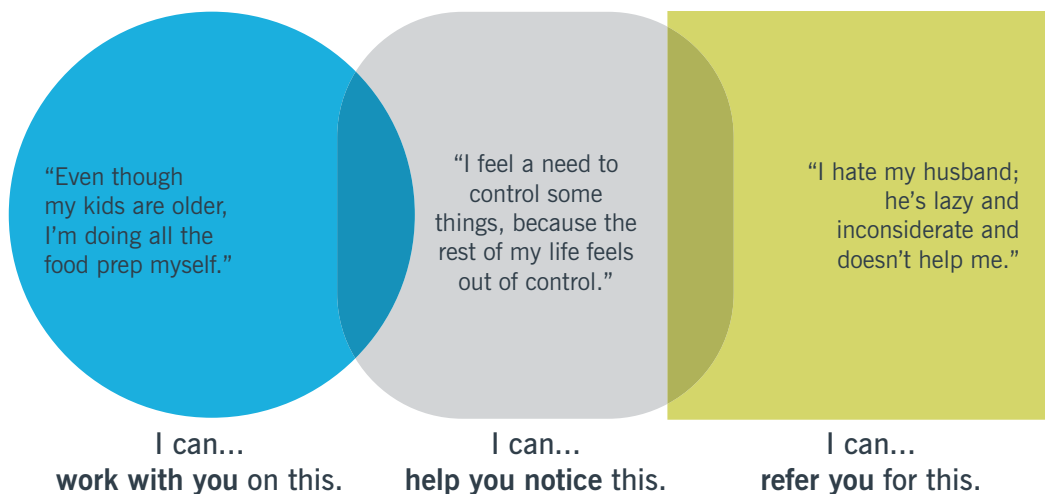
**Here are the gray areas of what you can offer clients:**







- **Listening, providing general support, and offering basic education** on areas outside of your scope if they affect your work together (e.g., listening empathetically to client concerns about pain, and explaining how pain can affect daily activity).
- **Encouraging clients to consult with a licensed healthcare provider** if any identified issues are significantly disrupting daily life and deep health.
- **Providing information on supplements generally regarded as safe for most people** (e.g., protein powder, omega-3, fiber, greens powders, vitamin C, etc.).
- **Providing general information on basic health, performance, and function assessments** (e.g., body weight, body composition, food journals, overall mood and energy levels, etc.).












## Specific scenarios in practice

**Here are some examples of how you can navigate the SOP boundaries in practice.**



SKILL DOMAIN	EXAMPLES (AND WHAT TO DO TO STAY IN SCOPE)	IN SCOPE?
<b>Nutrition</b>	<ul style="list-style-type: none"> <li>● Providing information on what “quality food” means, and how to measure different types of foods in hand portions</li> <li>● Helping clients document their eating habits (e.g., by keeping a food journal)</li> <li>● Talking through judgements and/or biases about what’s “the right” way to eat</li> </ul>	 <b>yes</b>
	<ul style="list-style-type: none"> <li>● Specifically addressing and/or diagnosing an eating disorder</li> <li>● Providing information related to food or supplement interactions with medication</li> <li>● <b>Instead, refer to:</b> Registered dietitian (RD), pharmacist</li> </ul>	 <b>no</b>
	<p><b>Example dialogue to navigate the in-between:</b></p> <ul style="list-style-type: none"> <li>● “We can definitely work together to identify some potential food sensitivities and/or triggers (e.g., through a food journal). Also, bear in mind that these are just educated guesses.”</li> <li>● “If you have concerns about specific sensitivities or allergies, your primary care doctor can help you with those tests.”</li> <li>● “If you don’t currently have another doctor, I’d be happy to help you find resources that are available to you.”</li> </ul>	 <b>yes, but</b>
<b>Movement</b>	<ul style="list-style-type: none"> <li>● Providing information on the role of movement and/or exercise in a healthy lifestyle</li> <li>● Helping develop a general movement routine that accommodates movement limitations and fitness level (e.g., a practice to spend 20 min per day walking or stretching in the evening)</li> <li>● Helping clients plan and prioritize exercise</li> <li>● Providing information and/or referrals to other qualified professionals as needed (e.g., a certified personal trainer, physical therapist, or pain specialist for an injury)</li> </ul>	 <b>yes</b>
	<ul style="list-style-type: none"> <li>● Providing exercise explicitly as a treatment for an injury</li> <li>● Providing targeted exercise programming for specific physiological adaptations (e.g., increasing speed or improving hip mobility)</li> <li>● <b>Instead, refer to:</b> Certified personal trainer, physical therapist, or pain specialist</li> </ul>	 <b>no</b>
	<p><b>Example dialogue to navigate the in-between:</b></p> <ul style="list-style-type: none"> <li>● “I can definitely help you brainstorm some ideas for movement that <i>don’t</i> cause pain for you.”</li> <li>● “It’s also important for me to mention: If your knee pain persists, I’d recommend that you seek out a physical therapist or other specialist. I can recommend a couple of people who have helped many other clients.”</li> </ul>	 <b>yes, but</b>

SKILL DOMAIN	EXAMPLES (AND WHAT TO DO TO STAY IN SCOPE)	IN SCOPE?
<b>Sleep</b>	<ul style="list-style-type: none"> <li>● Providing information on the value of sleep; exploring client beliefs about sleep</li> <li>● Showing how good/poor sleep affects clients' mood, focus, and decision making</li> <li>● Helping to build better daily sleep routines, suggesting improvements for the sleeping environment, etc.</li> </ul>	 <b>yes</b>
	<ul style="list-style-type: none"> <li>● Diagnosing a sleep disorder</li> <li>● Recommending sleep supplements without adequate evidence of safety or efficacy</li> <li>● <b>Instead, refer to:</b> Sleep physician (MD), psychologist with specialty in treating insomnia</li> </ul>	 <b>no</b>
	<p><b>Example dialogue to navigate the in-between:</b></p> <ul style="list-style-type: none"> <li>● “We can definitely talk about some of the best practices of a consistent sleep routine.”</li> <li>● “It’s also important for me to mention: If you have chronic concerns about your sleep, there are a lot of doctors who are thoroughly trained specifically to deal with those scenarios. I could recommend a couple of resources for you.”</li> </ul>	 <b>yes, but</b>
<b>Stress</b>	<ul style="list-style-type: none"> <li>● Providing information about stress; exploring client beliefs about stress</li> <li>● Educating clients about how the stress response works; encouraging them to notice how that appears in their own experiences (e.g., in their sleep and eating routines)</li> <li>● Helping clients develop planning and preparation skills to anticipate and prevent stress</li> <li>● Helping clients understand the practice of tolerating stress and how to become more stress resilient (e.g., meditation, spending more time outside, doing a mind/body scan, etc.)</li> <li>● Providing information about and/or referrals to other qualified professionals as needed (e.g., psychologist, counsellor, etc.)</li> </ul>	 <b>yes</b>
	<ul style="list-style-type: none"> <li>● Diagnosing and treating mental and emotional health issues (e.g., anxiety, depression, ADHD, bipolar, PTSD, etc.)</li> <li>● <b>Instead, refer to:</b> Psychologist, psychiatrist (MD), social worker (LCSW)</li> </ul>	 <b>no</b>
	<p><b>Example dialogue to navigate the in-between:</b></p> <ul style="list-style-type: none"> <li>● “We can definitely talk broadly about what you’re noticing regarding stress in your daily life, such as what your personal triggers are and how they affect your choices. We’ll keep it focused on basic next actions that you can control.”</li> <li>● “It’s also important for me to mention: If stress is becoming chronic and disrupting your daily life, there are a lot of qualified pros who are trained to address more specific problems related to stress — for instance, the symptoms of depression or anxiety.”</li> <li>● “If that seems like something that would be helpful for you, I could help you explore your options and make referrals.”</li> </ul>	 <b>yes, but</b>

SKILL DOMAIN	EXAMPLES (AND WHAT TO DO TO STAY IN SCOPE)	IN SCOPE?
<b>Change adaptation</b>	<ul style="list-style-type: none"> <li>● Educating about and normalizing the process of change, specifically on the topics/skills of emotional regulation, growth mindset, and self awareness</li> <li>● Discussing general trade-offs and ambivalence about change</li> <li>● Helping break down goals into small daily actions that work in the client's life</li> </ul>	 <b>yes</b>
	<ul style="list-style-type: none"> <li>● Targeted support through life transition or traumatic experience (e.g., grief counselling)</li> <li>● <b>Instead, refer to:</b> Psychologist, psychiatrist (MD), social worker (LCSW)</li> </ul>	 <b>no</b>
	<p><b>Example dialogue to navigate the in-between:</b></p> <ul style="list-style-type: none"> <li>● “Changing habits is definitely hard; especially deeply-seated habits that have been around for many years. It’s common for emotional and/or mindset barriers to come up in that process.”</li> <li>● “We can talk about those broadly and discuss some practices to help you make sense of the change as it relates to your goal of [x].”</li> <li>● “If you start feeling like specific issues are surfacing for you that you want to dig deeper into – physically, mentally, and/or emotionally – let’s talk about other resources and qualified professionals to support you with those. Living in good health takes a team of support.”</li> </ul>	 <b>yes, but</b>

## Potential other experts for referral:

- Medical doctor (MD)
  - Dentist (DDS, DMD) for issues related to the mechanics of eating and jaw health
  - Sports medicine doctor for joint and other athletic injuries
  - Gastroenterologist for digestive issues
  - Endocrinologist for hormonal issues
  - OB/GYN for women’s sexual and reproductive health issues
- Registered dietitian (RD, RDN)
- Pharmacist (PharmD, RPh)
- Licensed clinical social worker (LCSW)
- Registered psychologist or psychotherapist (RDPsych, RPsych)
- Doctor of psychology (PsyD)
- Licensed professional counselor (LPC/LCPC/LPCC/LMHC)
- Physical therapist or physiotherapist (PT)
- Certified strength & conditioning specialist (CSCS); Certified athletic trainer (ATC); Certified personal trainer (CPT)

## SOP questions to ask yourself

### FORMAL TRAINING AND QUALIFICATIONS

**Are you formally certified, licensed, or otherwise credentialed by a post-secondary institution and/or professional organization to deal with a particular health topic or concern?**

Formal designations are granted by accredited institutions and professional organizations (e.g., College of Dietitians, Royal College of Physicians and Surgeons, etc.).

Most licensed professions require postgraduate training such as a Masters or doctoral degree.

**If you hold a private certification, what was the nature of your instruction and the duration of your training?**

A weekend certification or a short online course does not qualify you for much.

**If you hold a private certification, is that certification recognized by legitimate post-secondary institutions or professional organizations?**

(E.g., the American Psychological Association, American College of Sports Medicine).

See if that certification is accredited for Continuing Education Credits (CECs) or Continuing Education Units (CEUs) by postsecondary institutions or professional organizations.

**If you hold a private certification, were you required to complete formal assessments?**

(E.g., exams, supervised practicums, graded written assignments, etc.)

### SUPERVISION AND MENTORSHIP

**Have you received targeted supervision and mentorship on a particular health topic or concern?**

**Have you completed some type of apprenticeship under the direction of another professional?**

Some types of education are more informal, e.g., working as a junior strength and conditioning coach under the direct supervision of a senior coach.

### REGIONAL REGULATION

**Is it legal for you to practice within your particular jurisdiction?**

What local legislation, regulation, and/or policies govern your practice?

What can you do and call yourself within this region?

Does your local region recognize your formal credentials?

For instance, within the United States, rules may vary by state. Within Canada, rules vary by province. If you received a designation in one country, it may not apply to another country.

## Scope of practice checklist

<b>I am formally certified, licensed, or otherwise credentialed by a post-secondary institution and/or professional organization to deal with a particular topic or concern.</b>	<input type="radio"/> Y	<input type="radio"/> N
<b>If I hold a private certification: I received at least 40 hours of instruction on a particular topic or concern.</b> (This may be less for upgrades to existing qualifications.)	<input type="radio"/> Y	<input type="radio"/> N
<b>If I hold a private certification: The certification education is recognized by legitimate post-secondary institutions or professional organizations.</b>	<input type="radio"/> Y	<input type="radio"/> N
<b>If I hold a private certification: I was required to complete some type of formal assessment on a particular topic or concern.</b>	<input type="radio"/> Y	<input type="radio"/> N
<b>I have received targeted supervision and mentorship on a particular topic or concern.</b>	<input type="radio"/> Y	<input type="radio"/> N
<b>It's legal for me to practice as I am doing within my particular jurisdiction.</b>	<input type="radio"/> Y	<input type="radio"/> N
<b>My work with a client addresses ONLY the topics I am qualified to discuss, in the way that I'm permitted to discuss them.</b>	<input type="radio"/> Y	<input type="radio"/> N
<b>I've reviewed the quick-reference table above and my work falls within the boundaries of appropriate scope.</b>	<input type="radio"/> Y	<input type="radio"/> N
<b>I know what type of other professional I could refer to, if needed.</b>	<input type="radio"/> Y	<input type="radio"/> N

### IF YOU CLICKED “NO” TO ANY OF THESE, HERE ARE SOME SUGGESTIONS.

- Pursue or complete a higher-level certification (e.g., Level 1, Level 2, or licensed credential if needed).
- Review your local regulations and consult with a local attorney for clarification if needed.
- Review the table above to ensure you are staying within your scope.
- Identify at least one relevant qualified professional to have in your referral network. Over time, build this referral network to include a wide range of credentialed providers.