

Personal Training Sales Contract Submission

“The Way it Works”

Date: January 28, 2020

To: Personal Training Managers, Personal Trainers, and Fitness Consultants

From: VP of Personal Training and Personal Training Accounting

In order to align all the clubs and create consistency, here are the clarified steps to submitting a personal training or team training contract.

1. Complete the correct agreement for the plan chosen by client (examples: 12-month EFT, Paid in Full, or 3-month TT) including all initials and signature lines.
 - Copies of agreements can be found on <http://www.mytacnet.com/fitness/pt/index.htm>
2. Collect payment for necessary amount of PT partial codes in POS at front desk. If after the 21st of the month, collect partials for current month and next month.
 - Ensure you are entering a member number under “Member Information” and a salesperson under “Item Selection.”
 - Choose the member who will be training even if they are not the person paying for partials/agreement. This makes sure their partials are associated with correct training client instead of main account holder.
 - i. Example: Mom is main account holder, but is signing minor child for PT agreement.
Choose the minor child’s name when processing partials through POS.
3. If client does not have a member number assigned, please use the snooze account to collect payment.
 - Staff should calculate the \$ amount due for the package or partial weeks and apply a POA- Payment on Account to snooze.
 - In comment section, enter:
 - i. Client name
 - ii. PT partial code
 - iii. Club location
 - iv. Salesperson’s name
4. Scan a copy of the contract and receipt. Complete online form and attach scanned file via link in MyTAC – Personal Training – Other Forms – PT Contract Submission. (see page 2)

Other Forms

- Personal Trainer Bio Submission
- Personal Trainer Session Extension Request Form
 - Need PDF? Use this one
- The 5 B's Observation Form
- Notification of Right of Cancellation
- Request PT Cancellation
- Approved or Denied PT Cancellation
- PT Contract Approved, Denied or Pending
- PT Contract Submission



PT Contract Submission

Client's Information

First name*

Last name*

Account Number*

Email*

Club*

PT Partial Code*

Who is the trainer?*

Partials: How many they purchased?*

Start Date*

Sold Date

Sales Person*

Attach a copy of agreement*

No file chosen