

# TotalWellness Agency Staff Manual



*Welcome to TotalWellness*

# Welcome to TotalWellness!

We're glad you're here. We couldn't help employees around the country begin the journey to better health without you. At TotalWellness, we hope all of our events will run like well-oiled machines. In order to do that, we need to make sure we're all on the same page.

We like to focus our events on positivity, and how that can affect a participant's health. We're all about creating a positive and memorable experience for each and every participant. This message is what we want to portray to you, our contractors, and ultimately to our participants. To stay true to our positive sentiment, let's start our training with a positive thought.

*"Sometimes the smallest step in the right direction is the biggest step you'll ever take."*

---

This document is designed to help you get to know us and our events. Please look it over, and let us know if you have any questions about what you've read. You'll be able to access all the TotalWellness procedures, forms and handouts on our agency website at [TotalWellnessHealth.com/Private/Agency](http://TotalWellnessHealth.com/Private/Agency).

We know it seems like a lot, but make sure you read through all of this information as soon as you can so you have plenty of time to get your questions answered. Enjoy!

# For Your Reference...

... this manual is to help you understand the TotalWellness services. All service specific procedures are included in the Appendix and on our website. If you have questions about any of the specific procedures, let us know.

The Basics	4
Event Expectations	9
Primary Contractor Responsibilities	16
Biometric Screening Procedures	26
Flu Shot Event Procedures	28
Emergency Procedures	51



# The Basics

There are some things you just need to know if you plan to work any of our events. Keep these things in mind and refer back to remember what each common TotalWellness term means.

## Primary vs. Secondary Contractors and Event Coordinators

---

**Secondary Contractors:** The support health professionals scheduled to work events. All contractors should follow general event procedures when working in this position.

**Primary Contractor:** The lead contractor assigned to each event. The primary contractor is responsible for setting secondary contractor assignments, overseeing station setup and leading the team through the event. The primary contractor receives, returns and transports all paperwork, supplies and equipment to and from events. He or she returns all materials to TotalWellness at the completion of each event. The primary contractor also acts as a link between TotalWellness staff and the client contact.

If there is only one contractor requested at any given event, any individual who nominates will be the primary contractor if they are selected to work that event.

**Coordinator:** A specially trained primary contractor who leads health screening events.



# TotalWellness Services

---

We specialize in offering on-site flu shot and biometric screening events nationwide.

Our biometric screening events usually include registration, finger-stick or venipuncture blood draw cholesterol and glucose tests, blood pressure, height, weight, and waist measurements and a brief health education session. We also offer other health fair services including fitness testing, hand washing education, and health education displays.

Our flu shot events can be held in conjunction with screening events, or as a standalone service. We offer a variety of vaccine options depending on the requests of our clients.

## TotalWellness Documents

---



There are a variety of documents associated with our events. Here is a nice glossary of what each document means. Refer back to it as you need to. You can also look in the Appendix and on our agency website for copies of each of these documents.

## Event Worksheet

A specific Event Worksheet (Appendix A) is generated for each event and will contain all the necessary details to work the event. We encourage you to print a copy of the worksheet and bring it with you to the event. By logging in to the scheduling system you can view and print the most up-to-date worksheet available.

**Event Location:** This is the physical address where the event will be held. The room name and building name, if applicable, will be included in the event location.

**Arrival Time:** This is the time that you are to be in the building, at the event, ready to get started. Be sure to allow time to park, check in at the front desk and go through security. You will be paid your standard hourly rate, starting at the event arrival time or when you arrive at the event, whichever is later.

The arrival time is usually 30 minutes to 1 hour prior to the event start time and is allocated for everyone to help setup, train and review client-specific details. Utilize this time to get organized by making sure equipment, supplies and paperwork are in order. This helps us be efficient and saves you headaches throughout the event.

**Event Time:** This is listed right next to the event date and includes both a start time and an end time. This is the time participants will be arriving at the event to partake in services. You must be available to provide services until the scheduled event end time. You will be paid your standard hourly rate for the event time worked.

**Break Time:** If an event has a scheduled break, the break time will be listed on the worksheet underneath arrival time. If there is no break time listed, the event does not have a break. All breaks are unpaid and are to be utilized to eat, use the restroom and rest prior to seeing more participants. If you leave the site during break, be sure to return before the break end time.

TotalWellness abides by state regulations pertaining to offering breaks. Work durations for breaktimes are determined based on the event start time.

**Contact Information:** This section includes the contact information for individuals that you may need to contact prior to or during the event.

- **TotalWellness Primary Contractor:** This is the on-site event lead provided by TotalWellness. They are a contractor, just like you.
- **Client Site Contact:** This individual is the client's representative on-site. You will ask for the site contact when you arrive at the event. The site contact will show you to the event room.
- **Account Manager:** Every client is assigned a TotalWellness account manager who works from the TotalWellness headquarters. The account manager works directly with the client and with the primary contractor to set expectations for the event.
- **TotalWellness Scheduler:** Every event is assigned a TotalWellness scheduler, who works from headquarters. If you have questions, the scheduler is the person you should reach out to first.

**Contractors:** This section lists all contractors who will be working the event.

**Agency Staff:** This section lists contractors that are provided by an outside agency to work events. They will provide services on behalf of TotalWellness if we struggle to find sufficient health professionals in any given area. They may need a time card signed by the primary contractor prior to leaving the event.

**Biometric Package:** This section details the services participants will be receiving at a health screening event. These services come as a package. All participants will receive these services.

The number of stations and number of tests per hour will be listed. Try to adhere to this throughput so the event can stay on schedule and run smoothly.

Be sure to read all the notes, as they contain client specific information we need you to know. If we have pre-assigned any contractors due to special requirements (i.e. specific training for a service, etc.) the information will be listed under the service notes sections.

**Screenings:** This section lists the optional health screening services that need to be made available to participants. They are not part of the package, but are extra services that participants can choose to partake in or skip.

**Flu Shots:** This section includes the types of flu vaccines, (vaccine from manufacturer-filled syringes, vaccine approved for 65+, etc.) as well as the number of each type. Pay attention to the types and quantities. If there are any specific stipulations for a participant to be eligible for a particular type of vaccine, it will be communicated in the notes section.

**Paperwork:** All services require paperwork. We require that a Consent Form be completed for every flu shot, biometric screening and/or invasive service provided. If a client is utilizing electronic data collection; the screening Consent Form will be completed on the iPad instead of in paper form. The paperwork section lists all paperwork that should be at the event.

If the paperwork is provided by TotalWellness, it will be included in the shipment to, and brought to the event by, the primary contractor.

If the paperwork is to be provided by the client, the site contact will provide copies of the paperwork when you arrive at the event.

For paperwork provided by the client, TotalWellness includes one copy of each type of paperwork in the primary contractor's shipment, so you can easily ask the client site contact to make copies if they didn't print out the paperwork in advance.

**Notes:** We want to provide you with as much information as possible prior to each event. All general event notes are included in the notes sections.

- **Secondary Contractor Notes:** These are general notes for all contractors.
- **Shipping Notes:** These are specific notes about supplies, materials and shipping.
- **Site Demographics:** This section includes specific site information such as English vs. Spanish speaking percentage, operating company name, blue collar vs. white collar, etc.
- **Driving & Parking:** This section outlines any parking and driving directions we received from the client. Keep in mind that you may need to pay for parking.
- **Entrance & Security:** This section provides information on which door to enter and any security requirements. If this section is blank, enter through the front door and stop at the reception desk to ask for the site contact.
- **Program Details:** Sometimes we have specific requests from clients and we include the information in this section.

## Event Time Extension Form

If a client asks you to stay past the scheduled event end time or if a participant arrives on or after the scheduled event end time, an Event Time Extension Form must be completed by the primary contractor and signed by the client.

Filling out this form ensures that contractors will be paid for the extra time. Return all completed forms to TotalWellness after the event.



## Consent Form

TotalWellness requires a Consent Form to be completed for any blood test (finger-stick or venipuncture blood draw), vaccination and/or invasive service. If a client is utilizing electronic data collection; the Consent Form will be completed on the iPad. As a contractor, you are required to keep all paper participant Consent Forms. The primary contractor on the event will return all completed paper Consent Forms to TotalWellness. Consent Forms completed on the iPad are automatically stored and available to TotalWellness.

## Incident Report

Incident Reports are our all-in-one forms used for basic charting, reconciliation, incident reporting, HIPAA violations, etc. In general, there are rarely instances in corporate wellness environments that warrant reporting. However, when anything significant and unexpected (i.e. vasovagal syncope, needle-stick injury, reaction to flu vaccination, a problem with a company or equipment) does occur, you must document it thoroughly.

Incident Reports can be found in the Important Event Forms Packet that is shipped with the box of supplies to the primary contractor, as well as online under the Training & Paperwork link in the TotalWellness Scheduling System.

If any incident occurs, an Incident Report must be completed. If the incident involves a participant, attach the Incident Report to the participant's Consent Form. If you complete an Incident Report, you must also contact TotalWellness at 402-964-0542. Your message should include your name, the event location (company, city, state) and a description of the incident.

## On-Site Time Log and Conduct Agreement

All contractors are required to sign in and sign out on the On-Site Time Log for start time, end time, and breaks in between. We also have contractors sign this form to acknowledge that they read, understood and agree to adhere to the Conduct Agreement - the document that outlines what we expect from our contractors at each event.

At the end of the event, the primary contractor completes a few questions on the form about the event.

## Confidential Envelope

All completed paperwork is to be placed in the provided confidential envelope and sealed prior to returning it to TotalWellness. Extra, blank copies of paperwork do not need to be placed in the envelope but can be recycled or thrown away on-site. Primary Contractors on events utilizing electronic data collection with only the On-Site Time Log and Conduct Agreement paperwork to return will be asked to submit the On-Site Time Log and Conduct Agreement electronically with their event summary instead of returning the original document. See Return Shipments Section of this manual for instructions on how to return your confidential envelope to TotalWellness.



# Event Expectations

We're a large national company when it comes to contractors like you, and we have contractors in all 50 states. In order to be sure our contractors are representing TotalWellness positively, we elicit evaluations from clients and contractors after every event. These evaluations help us to gauge contractor:

- Punctuality
- Preparedness
- Appearance
- Professionalism
- Knowledge
- Proficiency and efficiency of services
- Organization and efficiency of events
- Conduct



## Contractor Conduct

---

The behavioral expectations we have for you are outlined in our Conduct Agreement (Appendix B). This agreement needs to be completed by all contractors before each event. All aspects of the Conduct Agreement can be boiled down to:

- Conduct yourself appropriately and professionally
- Maintain consistency with the TotalWellness image
- Be a good teammate

Check out the full document in the appendix and work on these three big ideas, and you should be just fine.

## Transparency

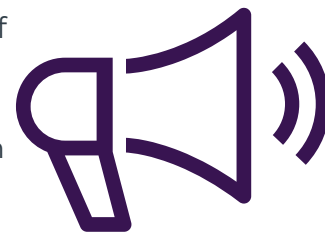
At TotalWellness, we believe participants play a vital role in their own, personal healthcare. Be sure to walk through all processes with them, not at them. Verbalize the steps you're taking, answer questions, and show participants the supplies you'll be using.

This type of transparent behavior not only helps participants feel more comfortable, but safeguards you against silly mistakes because you were just "going through the motions."

When our health professionals are transparent, everyone wins!

## Speak Up!

Here at TotalWellness we promote a “Speak Up!” environment, meaning if you are uncertain or unprepared, speak up and tell us. If you arrive at an event and have inadequate supplies or forgot something at home let us know right away. We would much rather postpone an event than have an event implemented without proper supplies.



We also encourage all contractors to notify us if an error occurs on-site so we can discover how the error occurred and create solutions to prevent the error from happening in the future.

## Service Efficiency

Provide services efficiently. We expect contractors to accomplish 15-20 height/weight/waist measurements per hour, 15-20 blood pressures per hour, 10-12 finger-sticks per hour, 6-8 blood draws per hour, 10-12 counseling sessions per hour, or administer 20-25 flu shots per hour. If we are providing services in a pod format we usually expect 4-6 participants per hour, per contractor.

## #IAmHealthy

At TotalWellness we believe everyone is healthy. That's right, everyone. We know that every person has some healthy habits. It's our goal to help them identify those habits and build more.

As a contractor, it's important you embody that sense of positivity in all interactions with participants. Avoid scare tactics, praise existing healthy habits, and help participants feel motivated to continue on their health journeys.

## TotalWellness Brand Attributes

### **Be motivating**

Nudge people into action and help break down the wall many participants put up.

### **Be approachable**

Be easy to know, easy to communicate with, and easy to deal with.

### **Be an ally**

Act as the rudder that helps participants navigate to calmer shores.

### **Be seasoned**

Let your experience shine and lead by example.

### **Be passionate**

Believe in what you're doing and who you're helping.

# Participant Experience

---

Always introduce yourself and provide a brief explanation of the service you are offering before performing a test/vaccination on the participant. Give the participant an opportunity to ask questions before and after performing the test/vaccination.

Remember the TotalWellness brand attributes when interacting with participants and answering questions. When providing health education to participants focus on what's going right and how they can improve rather than using scare tactics. No diagnosing or prescribing regimens! Rather than specific regimens, provide generic advice and explanations. If a participant does have a concerning value, recommend that they follow up with their primary care physician.

Make sure your station is set up in a clean and organized manner. When a participant arrives at your service area, make sure all attention is directed to the participant. All side conversations with other contractors should cease when in the presence of a participant. Our goal is to provide the participant with an efficient, friendly and informative experience.

## HIPAA and Participant Privacy

---

HIPAA is the law that regulates the privacy and security of identifiable health information. This type of information is highly sensitive and is exactly what you'll be dealing with at all of our events. To keep our participants' information safe, keep these things in mind.

- Keep forms and paperwork face down or covered when not in use.
- Don't let participants keep their Consent Forms. If participants need a copy of their consent form, ask them to take a picture of their completed form; or complete two forms (one for TotalWellness and one for the participant to keep).
- Don't leave forms or health data unattended.
- If you are on the only TotalWellness contractor working an event, take forms and health data with you on breaks.
- Don't give any individual health data to the employer, or allow the employer to make copies of completed Consent Forms.
- Confirm you have the correct participant by matching at least three participant identifiers (first name, last name, date of birth and/or unique ID) before discussing any health data.
- Speak to participants in a secure area where it's unlikely you'll be overheard.
- Speak to participants at a volume they can hear, but the rest of the room can't hear.
- Point to health screening results rather than saying them out loud.
- Only discuss an individual's health with that individual.
- Don't discuss participant information with anyone when you leave the worksite.
- Avoid visible, verbal or nonverbal cues as to what health data you might be discussing. For example, if you are shocked by a participant's numbers, don't show it.

# Privacy Practice Notice

---

TotalWellness has developed a Privacy Practices Notice. This is a document to inform participants about HIPAA and how we will keep their information private. It's the same type of document that every doctor's office makes you sign off on. This document should be made available on-site for participants to reference and can also be accessed online.

## Glove Policy

---

Medium gloves will be sent to each event that requires gloves. If you need a size other than medium, you'll need to bring them yourself.

We require that you wear 2 gloves (one on each hand) at all times when in contact with a participant where there might be exposure to blood, such as when administering a vaccination, a finger-stick test, or a venipuncture blood draw.

Gloves must be changed between each participant. So you will wear a new, clean pair of gloves for each participant. Do not reuse gloves, and please use the provided hand sanitizer in between glove changes.

Gloves contaminated with a pourable, dripable amount of blood (enough blood that it can be transferred from the glove to another surface) are considered biohazardous waste and need to be disposed of in a biohazard container/bag. Gloves that are not contaminated with a pourable, dripable amount of blood can be disposed of in a standard waste paper bin/trash can.



# Appearance and Attire

As with all health professionals, we like our contractors to look presentable and professional. Please arrive to the event clean, and generally well-groomed. Adhere to the following general guidelines when working at TotalWellness events:

- Wear a solid black scrub top, solid black scrub pants and a collared white lab coat.
  - Make sure your clothes and coat are clean. Please do not wear t-shirts, jeans, leggings, or plunging necklines.
- Wear clean, black, close-toed footwear in good condition. All black tennis shoes are acceptable. Heel height should not exceed three inches.
- Wear the TotalWellness name tag provided by your primary contractor. The stickers have a spot to write your name.
- Be neat, clean and conservative with no facial tattoos, visible neck tattoos, or visible offensive tattoos. Facial piercings, with the exception of small nose studs, are not acceptable.
- Keep jewelry to a minimum.
- Keep hair neat, clean and out of your face.
- Men should be clean-shaven. Beards and mustaches should be neatly trimmed.
- Fingernails should be clean and neatly trimmed to no longer than  $\frac{1}{4}$  inch long. Artificial nails and nail extenders are not allowed. Polish colors should be tasteful and appropriate for a business environment and maintained to avoid chipping. Extreme styles are not permitted.
- Please avoid wearing perfumes, or other body scents out of respect for individuals with allergies or asthma.
- Do not work an event smelling of smoke, vapor, tobacco, or alcohol.



## Tobacco and Drug Free Policy

As a wellness organization, our events are a tobacco, drug and alcohol free environment.

- Do not smoke, vape or use any other tobacco products before or during your event.
- Do not use, consume, or attempt to work an event under the influence of illegal drugs, drugs that impair judgement, or alcohol.

Evidence of tobacco, drug or alcohol use or being under the influence of drugs or alcohol on or near the premises is not allowed and may result in immediate dismissal from your event and all future events.

# Preparing for Your Event

---

Your Event Worksheet contains all the information you need for event preparation. Because the locations vary a bit, we know questions are common. Odds are, if you have a question about event preparation, other contractors might too.

**Question: Where is the location and how do I get there?**

Answer: Review the Event Worksheet for your event location. If the event is being held in a large building that houses multiple companies, the building name will be provided. Use GPS, Google Maps or MapQuest to ensure enough transportation time.

**Question: Where do I park?**

Answer: Review the Event Worksheet for parking instructions. Be prepared with cash for parking just in case. TotalWellness will reimburse for parking if documented properly.

**Question: Who do I ask for when I arrive at the event?**

Answer: If you don't see the primary contractor near the entrance, you can ask for the site contact. Remember to bring your ID in case there are any security measures upon arrival.

**Question: Can I start offering services before the scheduled event start time?**

Answer: Yes, if you are ready to go you can offer services before the event start time. Ideally, we like all contractors to be set up and ready at least 10 minutes before the scheduled start time.

**Question: What services are being offered?**

Answer: The Event Worksheet will list all services that are to be offered at the event. Service procedures are included in the TotalWellness Scheduling System under the tab Training and Paperwork. Popular service procedures can be found in the Appendix at the end of this manual.

**Question: Who is eligible to receive services?**

Answer: Generally services are only provided to individuals 18 years and older. Your worksheet will contain specific eligibility information if the client has special requirements.

**Question: Will the primary contractor call me prior to the event?**

Answer: Yes, the primary contractor will call all secondary contractors 3-5 days prior to the event. If for some reason you don't receive a phone call, still go to the event as planned. If you are concerned about an upcoming event feel free to call TotalWellness.

**Question: What if I am running late to an event?**

Answer: Although we hope you are never running late, we understand things sometimes happen. If you are a secondary contractor running late to an event, call the primary contractor to let them know. If you are a primary contractor running late to an event, call the site contact to update them on when you will arrive at the event and call TotalWellness.

# Material and Sharps Disposal

Dispose of trash and sharps appropriately and in the correct container. The primary contractor will take all sharps and biohazard materials with them when they leave the event.

- **Lancets** – Sharps Container
- **Capillary Tubes** – Sharps Container
- **Finger-Stick Slides and Strips** – Sharps Container or Biohazard Bag
- **Needles & Syringes** – Sharps Container
- **Gloves** – Biohazard Bags if considered biohazardous\* or regular trash if not biohazardous
- **Band-Aids** - Biohazard Bags if considered biohazardous\* or regular trash if not biohazardous
- **Gauze** - Biohazard Bags if considered biohazardous\* or regular trash if not biohazardous
- **Alcohol Swabs** – Regular Trash
- **Band-Aid Wrappers** – Regular Trash



Be sure that all needle safety devices are activated before disposing of syringes and needles in the sharps containers. Only fill sharps containers to the “Fill Line” as indicated on the container.

Regular trash is to be left on-site at the event, but we do recommend you condense the trash containers when possible.

Check your sharps container quantity prior to your event. If you are concerned about running out of space, call TotalWellness to ship you additional containers. Do not dispose of sharps in anything but a sharps container, and please use each sharps container until it is full. We encourage you to keep partially full sharps containers to use at your next TotalWellness event.

*\*Items with blood on them are considered biohazardous if the blood is present in pourable, dripable amounts. A pourable quantity is defined as the ability of a liquid or semi-liquid form to drip or flow. Items caked with dried blood that are capable of releasing the blood during handling are also considered biohazardous. If you can squeeze blood out of an item or if dried blood can fleck off of the item when pulled taught, the item is considered biohazardous.*

## Event Clean Up

Part of being an excellent vendor with which to work includes leaving the workspace exactly as we found it. Be sure to leave the location clean and orderly (better than you found it, if possible!). It is okay to start packing up the event during the last 5 minutes, but you must be able to offer all services until the scheduled end time, even if that means unpacking supplies. If needed, you are allowed up to 15 minutes past the event end time, paid at your standard hourly rate, for event cleanup. If you are the primary contractor try to dismiss secondary contractors if you can, not everyone has to stay to cleanup.

# Primary Contractor Responsibilities

The primary contractor is responsible for a number of duties involved with leading the event. Remember, if you're the only contractor working an event, that makes you the primary contractor. Primary contractors might also work events with multiple other contractors.

## Phone Calls & Communication

**Site Contact Touch Base:** Primary contractors are responsible for calling the client site contact at least 5 days prior to the event. The site contact's phone number is included on the Event Worksheet.

We ask primary contractors to make a warm introduction to the site contact, check if the site contact has any last minute details to share, and verify the quantity and type of services ordered.

If the client's expected participation numbers don't match the numbers on your worksheet, ask the client to contact their TotalWellness account manager ASAP about event changes.

It is ok to leave a voice message for the site contact, but it is not ok to email the site contact instead of calling. If you leave a voice message, you do not need to require the site contact to call you back. By leaving a voice message, you've fulfilled your site contact phone call obligation.

**Secondary Contractor Touch Base:** Primary contractors are required to call all secondary contractors at least 3 days before the event. We ask the primary contractor to introduce themselves to the secondary contractors and provide a brief description of the upcoming event offerings. The phone calls are also a great opportunity to relay any information received from the site contact, such as specific driving directions or parking instructions.

Contact your TotalWellness Scheduler if you are having difficulty reaching a secondary contractor and are concerned they may not show for the event. We'll reach out to the contractor or may choose to add a new contractor to the event.

**TotalWellness Touch Base:** Primary contractors are responsible for notifying TotalWellness immediately if a secondary contractor does not arrive for an event.

**Site Contact Summary:** The primary contractor should provide the site contact with a brief summary prior to leaving the event. Also provide an opportunity for the site contact to ask any questions before leaving the premises.

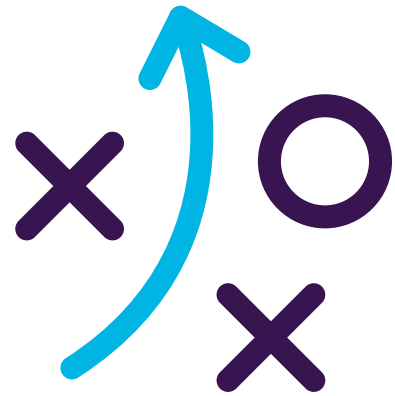


# On-Site Event Preparation and Implementation

A lot happens between the event arrival time and the scheduled event start time. This time is utilized for the following tasks:

**Station Setup:** The primary contractor will bring all supplies necessary for each station's setup. Be mindful to organize the event space and supplies so the event can flow smoothly.

**Station Assignment:** We don't usually pre-assign stations prior to the event. Using each contractor's feedback (on the day of the event), the primary contractor will assign contractors to stations in which they feel comfortable and confident in providing the services.



**Paperwork Prep:** Your Event Worksheet will indicate the paperwork required for the event and who is supplying that paperwork.

If the paperwork is supplied by TotalWellness it will be included in your shipment, and you need to bring it to the event.

If the client is supplying paperwork, the client is responsible for having copies available for you prior to the event. Ask the site contact for the paperwork. If the site contact hasn't made copies yet, politely ask them to do so.

**Conduct Agreement & On-Site Time Log:** The primary contractor will review the Conduct Agreement with all secondary contractors prior to the event. All contractors are required to document their arrival time, break times and end time on the time log, and to sign the log to indicate that they have read, understand and agree to adhere to the Conduct Agreement.

**Group Huddle** (Health Screening Events Only): The primary contractor will gather all TotalWellness medical professionals prior to each event to review any client specific details and ensure contractors have opportunities to ask questions.

If you stay past the scheduled end time...

**Event Time Extension Form:** If a client asks you to stay past the scheduled event end time or if a participant arrives on or after the scheduled event end time, you'll need to complete an Event Time Extension Form and have the client sign it. This will help us be sure we compensate all contractors correctly.

# Handling Supplies

Primary contractors are responsible for receiving supplies, transporting supplies to and from events, and shipping supplies and completed paperwork back to TotalWellness. Please adhere to the policies below.

## Receiving Shipments

We ship all equipment, vaccine, supplies and materials directly to the primary contractor instead of the event location. This gives the primary contractor the opportunity to verify all supplies were received in good condition prior to the event and gives time for TotalWellness to send replacements if necessary.

Our designated shipper is FedEx. When a shipment is generated you'll receive an email from FedEx with the tracking number(s) for your package(s). Tracking numbers are also available in the TotalWellness Scheduling System. Expect to receive shipments 3-7 business days prior to your event. If you have not received an email or package(s) within 3 business days of your event, contact the TotalWellness shipping team at 402-964-0542 ext. 1030.

For flu shot events, we send two shipments per event. The first shipment will contain all supplies and the second shipment will contain the vaccine. The shipments may arrive in any order. If you are the primary contractor on multiple flu shot events, during the same week, we will normally send you one combined supply shipment and one combined vaccine shipment. Make sure you utilize the correct supplies and vaccine for each event.

Vaccine supply shipments will be sent using FedEx Ground and usually arrive the week prior to your event; but should always arrive at least 3 business days before your event. Shipments may be delivered in the evenings and on Saturdays. You can expect to receive an email from FedEx, with tracking information, when your supply shipment goes out.

Vaccine is sent using FedEx Overnight. In general, TotalWellness abides by the below vaccine shipping schedule.

<u>Event Day</u>	<u>Receive vaccine on:</u>
------------------	----------------------------

Monday	Tuesday the week before your event
Tuesday	Wednesday the week before your event
Wednesday	Thursday the week before your event
Thursday	Friday the week before your event
Friday	Tuesday the week of your event
Saturday	Tuesday the week of your event
Sunday	Tuesday the week of your event



Please don't refuse any shipments from TotalWellness. Any vaccine in the shipment could be ruined. If you think a package was sent to you by mistake, accept it and contact TotalWellness. If you will be unavailable when your packages are set to arrive, contact the TotalWellness shipping team at 402-964-0542 x1030 to make special arrangements.

## Checking Supplies

Each shipment includes a packing list. Utilize the packing list to verify all supplies were received. Immediately unpack vaccine and store it properly, as indicated in the Flu Event Procedures portion of this manual.

Vaccine is shipped with temperature indicators (TransTracker® CF) to ensure it is viable when received. Record the status of the temperature indicators and inventory the vials and/or manufacturer-filled syringes on the Vaccine Storage and Transport log. Pay special attention to flu vaccine to ensure the correct type was received.



# Returning Shipments

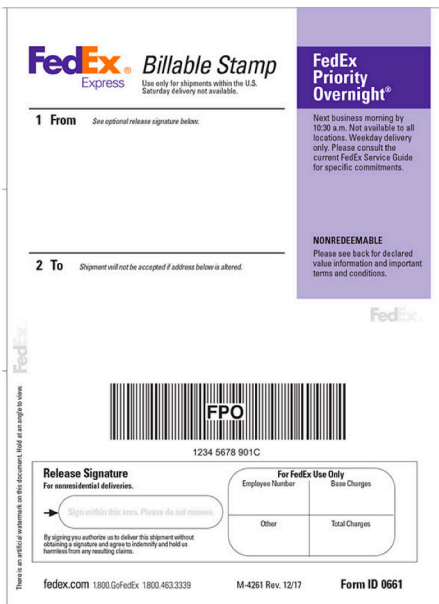
Your shipping return method will depend on the event type, quantity of Consent Forms and the materials you have left.

For health screening events without flu shots, use the provided overnight envelopes to return completed consent forms and other paperwork as soon as possible after each event. Use the instructions provided by the shipping department for returning all other equipment and supplies.

The primary contractor is responsible for returning all completed Consent Forms, vaccine, equipment, paperwork, and applicable leftover supplies after each event. If TotalWellness does not receive all completed Consent Forms, paperwork, equipment, and full unused vaccines we may hold your check until all materials are received.

FedEx return labels are included in each shipment, usually in the bag with the event paperwork. Be sure to utilize the correct type of label on each return shipment. Our return shipping labels contain all the necessary address and account information, so you will not be charged for the shipment. We ask that you keep all tracking numbers just in case we need to investigate a return shipment. If you do not keep your tracking numbers, and we do not receive your return shipment you may be liable for the lost vaccine/supplies.

## Overnight FedEx Return Label



The form is a FedEx Billable Stamp for Priority Overnight service. It includes a 'From' section with a signature line, a 'To' section with address fields, and a 'Release Signature' section. A purple box on the right contains service details and a 'NONREDEEMABLE' warning. A barcode with the number 1234 5678 901C is at the bottom.

**FedEx Express Billable Stamp**  
Use only for shipments within the U.S. Saturday delivery not available.

**1 From** See optional release signature below.

**2 To** Shipment will not be accepted if address below is altered.

**FedEx Priority Overnight®**  
Next business morning by 10:30 a.m. Not available to all locations. Weekday delivery only. Please consult the current FedEx Service Guide for specific commitments.

**NONREDEEMABLE**  
Please see back for declared value information and important terms and conditions.

**Release Signature**  
For nonessential deliveries.  
Sign within this area. Please do not remove.

**For FedEx Use Only**  
Employee Number  
Other  
Business Charges  
Total Charges

1234 5678 901C

fedex.com 1.800.GoFedEx 1.800.463.3339 M-4261 Rev. 12/17 Form ID 0661

← Look for overnight here

## Ground FedEx Return Label



The form is a FedEx Ground Package Returns Program label. It includes a 'From' section with address fields, a 'Ship To' section with address fields, and a barcode. A red box at the top contains the program name and a 'Turn Over for Instructions' instruction.

**FedEx Ground® Package Returns Program**

**From:**  
Address  
City  
State/Prov.  
ZIP/Postal  
RMA#

**Turn Over for Instructions**

**Ship To:**  
TOTAL WELLNESS  
9308 H CT  
OMAHA NE 68127

**FedEx Ground® PRP**

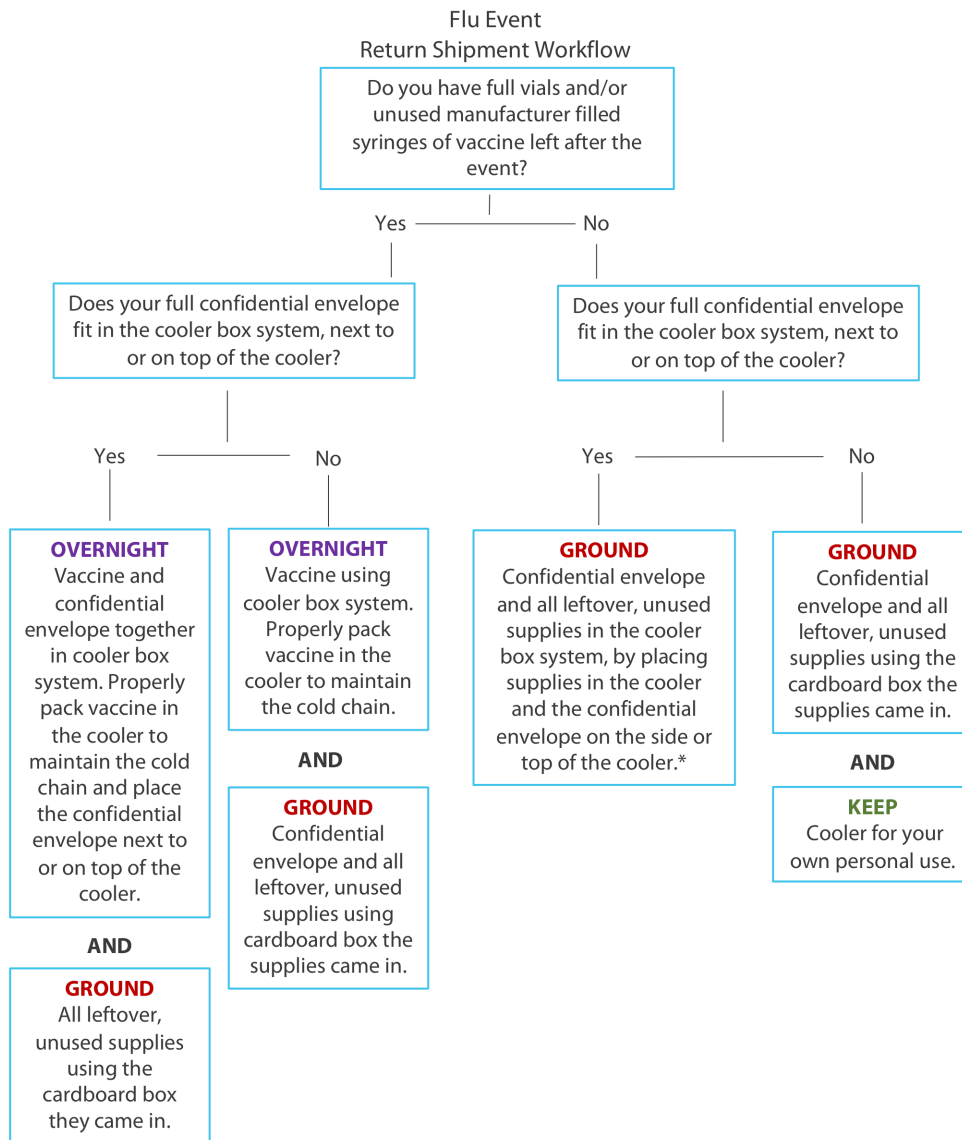
**SAMPLE**

(9612018) 0531434 00285560

← Look for ground here

# Returning Shipments

For events with flu shots, use the workflow below for return shipments.



\*When shipping supplies back in the cooler it is most important to return the epinephrine, syringes, and cold packs. If all supplies will not fit in the cooler, gloves, band-aids, gauze, alcohol wipes, hand sanitizer, thermometers, transtrackers, and/or placemats can be kept until your next return shipment to TotalWellness that they will fit into or be kept for your own use.

Supplies means biohazard bag(s), hand sanitizer, epinephrine kit, all unused placemats, gloves, band-aids, gauze, alcohol wipes, syringes, needles and sharps collector kit(s). Supplies can also include cold packs, transtrackers, and thermometers if you are not returning vaccine.

Cooler box system means the Styrofoam cooler and the white cardboard box it was shipped in.

## Returning Shipments

Used sharps containers should be returned in the dual box system, using the United State Postal Service (USPS). Complete sharps return details are included later in this manual. Empty, unused sharps containers should be returned to TotalWellness with your other leftover, unused supplies.

All shipments (except used Sharps Containers) need to be dropped off at a staffed FedEx facility in time for their last pickup of the day. Do not call FedEx to pick up your return shipment, and do not leave it at a facility after the last pickup of the day. You can find the nearest FedEx location at [www.fedex.com](http://www.fedex.com) or by calling 1-800-GOFEDEX. Never drop off supplies in a FedEx drop box or leave on-site. If you are having trouble locating a FedEx facility call the TotalWellness shipping team at 402-964-0542 ext. 1030 for special instructions. Please, don't use any other shipping service.

Shipment containing vaccine can only be shipped back on Mondays, Tuesdays, Wednesdays, and Thursdays to ensure TotalWellness receives the vaccine in time to maintain the cold chain. If you complete an event on a Friday, Saturday, or Sunday hold onto the vaccine, maintain the cold chain, and return the vaccine on the following Monday.

## Returning Flu Vaccine

Be sure to maintain the vaccine cold chain while vaccine is in your possession. When you are ready to return vaccine, document the temperature and temperature indicator statuses on the Vaccine Storage and Transport Log just prior to closing the cooler.

Return all unopened vaccine vials and capped, unused, manufacturer-filled syringes in the insulated Styrofoam cooler. Utilize the cold packs and foam barriers provided in your original shipment to package the vaccine for its return trip to TotalWellness.

Be sure to condition the frozen cold packs by leaving them at room temperature for 1-2 hours until the edges have defrosted and the packs look like they have been sweating. This will help prevent the cold packs from freezing the vaccine.

Pack your return vaccine shipment in the following manner.

**Cold Packs:** Place conditioned cold pack on the bottom of the cooler.

**Barrier:** Completely cover the conditioned cold pack by placing a minimum of 8 layers of foam on the conditioned cold packs.

**Vaccine & Temperature Indicators:** Place vaccine on top of foam barrier. Place thermometer and temperature indicators in between boxes of vaccine. Never allow vaccine or temperature indicators to come in direct contact with the cold packs.

**Barrier:** Completely cover the vaccine with a minimum of 8 layers of foam.

**Cold Packs:** Place conditioned cold packs on top of the foam layer.

**Filler:** Fill the cooler to the top with extra foam or paper.

# Returning Flu Vaccine

Remember, return shipments containing vaccine can only be shipped on Mondays, Tuesdays, Wednesdays, and Thursdays. If your event is on Friday, Saturday, or Sunday, return shipments on the next Monday. Always use the provided overnight FedEx labels to return vaccine to TotalWellness.

Cold packs must be frozen and then conditioned before returning vaccine. If your event spans longer than two hours, you should not immediately return vaccine after your event. Refreeze your cold packs and refrigerate your vaccine. Ensure cold packs have been properly frozen and conditioned prior to returning vaccine to TotalWellness.

You may keep partially used vials and use them at your next event as long as you maintain the cold chain throughout the entire time the vaccine is in your possession, the same type of vaccine has been ordered for your next event, the vaccine is used before its beyond use date (BUD) and the vaccine is not expired. If you're not working other events, return partial vials to TotalWellness with any remaining full vials or unused manufacturer-filled syringes. If you only have partial vials of vaccine left and you do not have any upcoming TotalWellness events, you can dispose of the partial vials in your sharps container.

Transtrackers and thermometers should be utilized when returning vaccine. If you do not have vaccine to return, you can send back thermometers and transtrackers with your ground shipment or keep with any partial vials you are keeping for future TotalWellness events.

Return all vaccine to TotalWellness, do not throw vaccine away. If you are returning vaccine that is not viable, clearly label the vaccine prior to returning to TotalWellness.

# Returning Sharps Containers

We encourage you to keep sharps containers until they are full. Once full, or after your last event, sharps containers containing needles are to be shipped through the United States Postal Service (USPS) using the provided dual box system. Follow the instructions below to return sharps shipments safely and securely.

1. When the sharps container is full, firmly snap the plastic lid in place.
2. Place the container into the provided plastic bag. Close the bag with the twist tie provided.
3. Put the bag-enclosed container into the protective brown box.
4. Insert the brown box into the USPS-approved white shipping box.
5. Carefully seal the carton flap with the provided water-resistant tape.
6. Remove the Customer Manifest Tracking Document from the plastic pouch that is affixed to the outside of the white shipping box. Complete the form and insert into the plastic pouch. Keep the yellow copy for your records. The Post Office will not accept your carton without the Manifest Tracking Document.
7. Drop off the box at your local Post Office or other location that accepts USPS packages.

# Returning Paperwork

Enclose all paperwork in the provided confidential envelope(s), including:

- Completed Consent Forms
- Event Worksheet
- On-Site Time Log & Conduct Agreement Acknowledgment
- Incident Reports (if applicable)
- Event Time Extension Form (if applicable)
- Event Roster (if applicable)
- Signed Standing Orders (if applicable)

Seal the envelopes before returning to TotalWellness. Use the Return Shipment Workflow to determine the return shipping method for your paperwork. Any unique requirements for returning paperwork will be listed on your event worksheet.


Paperwork is extremely important to return promptly because it includes medical documents and information for contractors to get paid. Be sure to return all paperwork listed above for each event. All extra paperwork can be recycled or thrown away on-site.

Don't let companies keep or copy completed Consent Forms. That is a HIPAA violation, and can cause serious trouble.

The Vaccine Storage and Transport Log should remain with your vaccine at all times. Be sure to return this form when you return your vaccine.

As a nurse administering vaccinations in your state, you are responsible for complying with all state immunization registry requirements and completing submissions prior to returning paperwork to TotalWellness.

**CONFIDENTIAL**  
**HIPAA PROTECTED INFORMATION**  
**If found do not open, call 888.434.4358 immediately.**

**TOTALWELLNESS**  
9320 H Court  
Omaha, NE 68127

Event ID: \_\_\_\_\_

Event Date: \_\_\_\_\_

Number of Flu Shot Consent Forms in Envelope: \_\_\_\_\_

Number of Screening Consent Forms in Envelope: \_\_\_\_\_

**Return Instructions:**  
Process all paperwork (listed below) on-site and seal envelope before returning to TotalWellness.

- Consent Forms
- Event Worksheet
- Onsite Time Log
- Appointment Roster (if applicable)
- Participant Surveys (if applicable)
- Time Extension Form (if applicable)
- Incident Report (if applicable)

By signing below I confirm that I have included all consent forms and paperwork in envelope.

\_\_\_\_\_  
Primary Contractor Signature

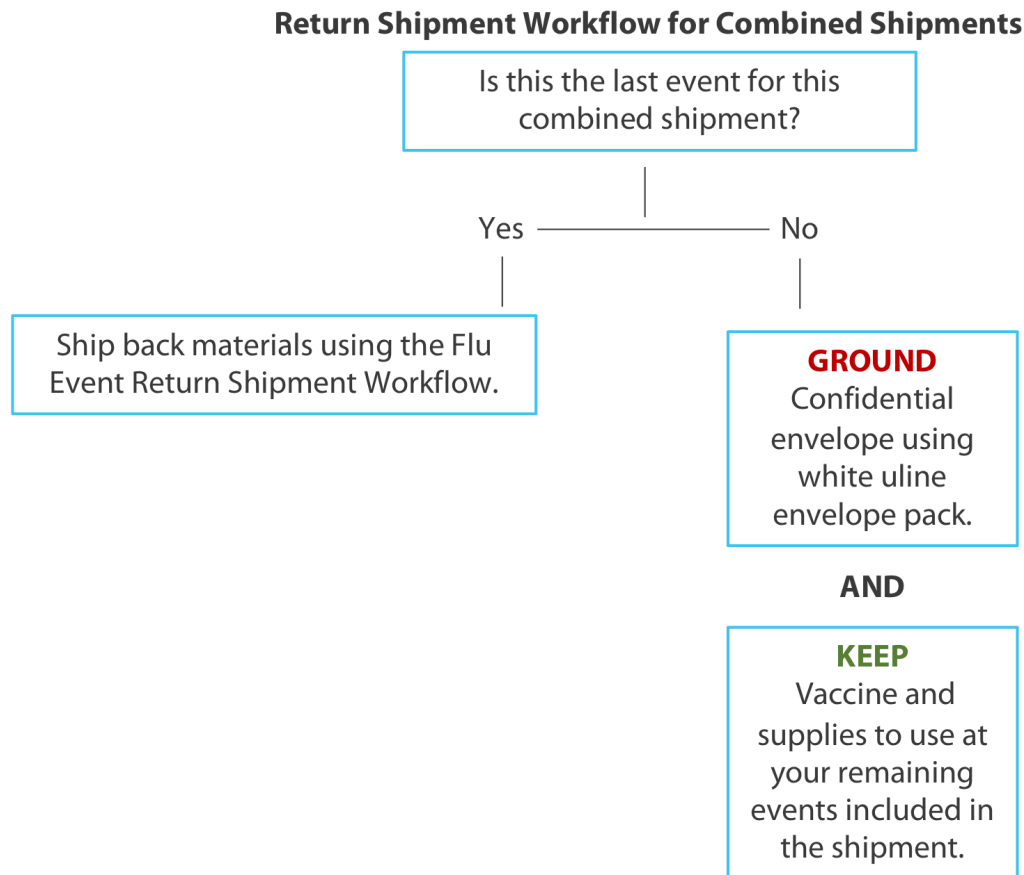
**Questions?**  
Contact the TotalWellness Shipping Department at 888.434.4358 x103.

Envelope \_\_\_\_ of \_\_\_\_



# Combined Shipments

If you are the primary contractor scheduled on multiple events, in the same week, we may combine your shipments into one vaccine shipment and one supply shipment. Utilize the Return Shipment Workflow for Combined Shipments for determining your return shipping process and method.



# Biometric Screening Procedures

Read the following for key points about biometric screening events. Be sure to review your Event Worksheet and the service procedures in the TotalWellness Scheduling System. Don't hesitate to reach out with any questions about biometric screening procedures.

## Service Delivery

---

Biometric screening services will either be delivered in a station to station model or a pod format. With the station to station model participants partake in one service per station. For example the participant would walk to the height/weight/BMI/waist station. After receiving those measurements, he or she would walk to a different station to have his or her blood pressure checked.

In the pod format all biometric screening services are offered at one station, by one contractor. When administering screenings in a pod format it is important to do the finger-stick blood test first. This allows you to provide other services while the machine is processing the blood sample.

While we want our events to display a consistent image of TotalWellness, the format of the event can definitely vary from site to site. Depending on the needs of the client, space and time availability, security measures, and the variety of participants in attendance, you might receive special instructions regarding service delivery at each event. If this is the case, these instructions will be clearly communicated to you on your Event Worksheet, as well as by the primary contractor at your event.

## Services and Procedures

---

The Event Worksheet will list all services that are to be offered at the event. Service procedures are included in the TotalWellness Scheduling System under the tab Training and Paperwork. Popular service procedures can be found at the end of this manual.

- Participant Experience Procedure (Appendix C)
- Station Setup Procedure (Appendix D)
- Registration Procedure (Appendix E)
- BMI, Height, Weight, & Waist Circumference Clinical Screening Procedures (Appendix F)
- Blood Pressure Screening Clinical Procedure (Appendix G)
- Finger-Stick Cholesterol & Glucose Clinical Screening Procedures (Appendix H)
- Venipuncture Blood Draw Cholesterol & Glucose Clinical Screening Procedures (Appendix I)
- Results Review Procedure (Appendix J)

# Health Screening Certification

TotalWellness has created a health screening certification program to ensure contractors are administering screenings accurately and consistently across all events. The health screening certification program is available for all contractors wanting to work health screening events and it can be accessed within the TotalWellness Scheduling System under the tab “Training and Paperwork.” The certification program is not mandatory, but highly recommended. Those who complete the certification will have a better chance of being selected to work health screening events when nominating.

## Equipment

---

TotalWellness will send all of the equipment necessary for screening procedures. For the most part we use standard equipment for our procedures.

### Finger-stick

TotalWellness utilizes both CardioChek ® Plus machines for finger-stick cholesterol and glucose testing.

Review the finger-stick procedures and video links if you are unfamiliar with finger-sticks. If time allows and you are a good candidate, the primary contractor may train you on finger-stick procedures.

### Stethoscopes

TotalWellness will send enough stethoscopes to cover each blood pressure station at your event. You’re more than welcome to bring your own, though, if you’d like.

## Electronic Data Collection

Some TotalWellness clients choose to collect data on-site electronically instead of using a paper consent form. If your event has electronic data collection, TotalWellness will provide iPads to collect the data. Each contractor will be provided with one iPad. iPads will have cellular connectivity or a cellular hotspot will be sent to provide internet access.



# Flu Event Procedures

Flu shot events vary a bit from screening events. There are a few things you need to know when it comes to handling and administering vaccine. We only allow licensed nurses to administer flu vaccinations. If you are not eligible to administer flu vaccinations, feel free to skip this section.

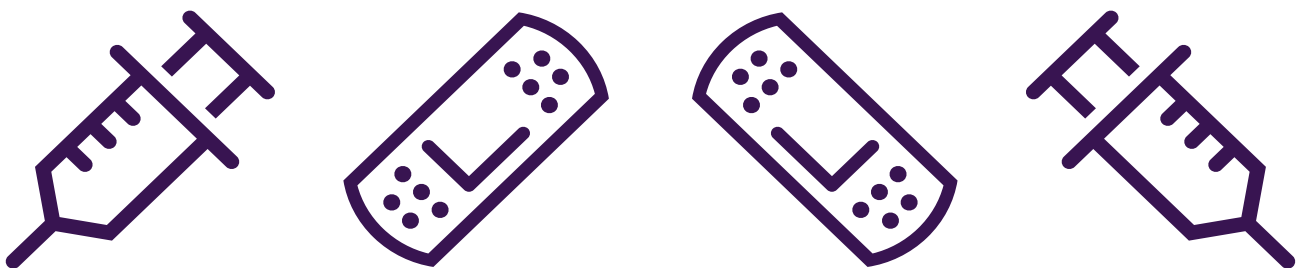
In certain states RNs are required to be on-site to supervise other nurses (LPNs and LVNs) and in other states only RNs are allowed to administer flu shots on-site. TotalWellness is mindful to staff events according to each state's regulations.

If an RN is required to be on-site and supervise other nurses, the RN will be listed as the primary contractor. If flu shots are being offered at a health screening event, the nurses eligible to administer flu vaccinations will be listed on the worksheet in the flu shot notes section.

## Preparing for Your Event

---

We usually have a pretty large volume of flu events. Some of these, you might even be tasked with working on your own. It's important to be as prepared as possible so employees can get the most out of their flu shot event. Please be efficient when administering flu vaccinations. TotalWellness expects nurses to administer 20-25 shots per hour.



## Flu Shot Supplies

- Vaccine
- Band-Aids
- 1mL, 1-inch VanishPoint® safety syringes OR 1-inch safety needles
- 3mL, 1½-inch VanishPoint® safety syringes for larger participants OR 1½ inch safety needles
- Hand sanitizer
- Epinephrine kit
- Placemat(s)
- Biohazard bag
- Medium-sized powder-free and latex-free gloves
- Styrofoam cooler(s)
- Sharps containers(s)
- Cold packs
- Alcohol wipes
- Foam barriers to be placed between vaccine and cold packs
- Gauze
- Thermometer & temperature monitors
- Pen

Each flu event shipment will also include an Event Information Packet. The Event Information Packet includes all necessary paperwork for the event, including the flu vaccine and epinephrine standing orders. Standing orders can also be accessed online through the TotalWellness Scheduling System. For your convenience, TotalWellness also includes one copy of our standard consent form and the current influenza vaccine information statement (VIS) in case you need to provide originals for the site contact to make copies from. The paperwork in the Event Information Packet should always be taken on-site.

TotalWellness does not provide blood pressure cuffs or stethoscopes for flu-only events; however, you can bring your own if you desire.

Use all supplies carefully so you don't unnecessarily waste or run out of anything. Please don't open Band-Aids until you're ready to use them. Your event packing lists will include the quantities of vaccine and supplies included for your event. It is ok to utilize all of the vaccine and supplies for an event, even if you go over the number of shots ordered.

Don't utilize supplies from a different, upcoming event without prior approval from TotalWellness. Make sure you are disposing of materials correctly, according to the Materials and Sharps Disposal section featured earlier in this manual. That way you won't run out of room in your sharps container(s).

Make sure sharps containers and biohazard bags are securely closed prior to leaving your event. Remember to take these containers with you when you leave. Do not leave sharps or biohazard bags on-site. As a reminder materials are considered biohazardous if they are saturated with a pourable, dripable amount of blood.

Review your sharps container quantity prior to the event to ensure you will have enough sharps space. One 1.5 quart sharps container can hold up to 70 used VanishPoint® syringes or 40 manufacturer-filled syringes. One 1 gallon sharps container can hold up to 150 manufacturer-filled syringes. You'll be sent the size and quantity necessary for your event. If you don't think you'll have enough space in your sharps container, call TotalWellness and we will ship you another sharps container.

# Flu Vaccine

---

If you've been chosen to work a flu event, we trust that you have some knowledge about influenza and the influenza vaccine. Here are some important things to keep in mind in regard to vaccinating employees at their workplaces.

## Types of Vaccine

Pay special attention to the vaccine types listed on your Event Worksheet and the vaccine types provided to you in your shipment.

Flu Vaccine Options Include:

- Vaccine from multi-dose vials
- Vaccine from manufacturer-filled syringes (preservative free)
- Vaccine approved for individuals 65+

If a client orders a certain type of vaccine for a certain population, this will be documented on your Event Worksheet.

Most commonly, TotalWellness provides vaccine from manufacturer-filled syringes for events, which is preservative free. Vaccines from multi-dose vials are not preservative free as they contain trace amounts of the preservative thimerosal. While the current scientific consensus is that no convincing evidence supports claims that thimerosal is connected to autism or any other neurodevelopmental disorders, many people believe there is a connection.

Vaccine safety can be a controversial topic. Please be prepared to answer questions about the safety and makeup of the vaccine knowledgeably and respectfully.

65+ flu vaccinations are specially formulated vaccines approved for individuals 65 years old and older.

## Vaccine Lot Numbers

When vaccine is made it is given a lot number and there are several different lot numbers each year. It is important to correctly document the lot number on each participant's Consent Form in case the lot proves to be ineffective or recalled.

## Physician Standing Order

A physician standing order for flu shot vaccinations and epinephrine injections is included in each paperwork packet. Review and sign this document prior to your event and bring the document with you to the on-site event. Return the signed standing order to TotalWellness.

## Beyond Use Date

Some vaccines should be used within a certain time frame after the first time a needle is inserted into a multi-dose vial (commonly referred to as “entering” the vial). The Beyond Use Date (BUD) is the date or time after which the vaccine should not be used.

The BUD may not be the same as the expiration date printed on the vial by the manufacturer. The BUD varies among vaccines and can be found in the package insert. Check the package insert to determine if the vaccine has a BUD and for the correct time frame (e.g., days, hours) the vaccine can be stored once the vial has been entered.

Calculate the BUD using the time interval found in the vaccine’s package insert. Label the vaccine with the correct Beyond Use Date/time and your initials. You may keep any partial vials left after an event to utilize first at your next TotalWellness flu shot event as long as you maintain the cold chain for the entire duration the partial vials are in your possession, the same type of vaccine has been ordered for your next event and as long as the vials are used before the BUD.

## Storing and Transporting Vaccine

Proper storage and transport of vaccine is absolutely essential. Whether vaccine is in multi-dose vials or manufacturer-filled syringes, it needs to be maintained the same way. If vaccine is not stored and transported properly, its effectiveness drops, and it may not be suitable for use.

Please follow our guidelines when it comes to maintaining the vaccine cold chain while the vaccine is in your possession. If you have any doubts at all about the quality of vaccine, please call the TotalWellness Director of Nursing at 402-964-0542 ext. 1210. TotalWellness will contact the manufacturer to confirm if the vaccine is acceptable for use.

## Receiving Deliveries

Vaccine will be shipped to you in a hard-sided Styrofoam cooler utilizing cold packs and foam barriers to keep the vaccine at the appropriate temperature. Unpack and examine deliveries immediately upon arrival.

- Examine Styrofoam cooler and vaccine for signs of physical damage
- Check quantity and type(s) of vaccine against packing list to ensure they match
- Check vaccine expiration dates
- Freeze cold packs
- Check the vaccine thermometer and temperature indicators

If you are concerned about the condition or quantity of the vaccine you received, contact the TotalWellness Director of Nursing at 402-964-0542 ext. 1210 immediately.

# Vaccine Storage

Pay special attention to how you store vaccine in your possession. This will help you ensure you arrive on-site at the event with effective vaccine, rather than vaccine that's been damaged due to improper storage.

## Where to Store

After vaccine has been checked according to the procedures previously mentioned, immediately store the vaccine at the recommended temperature of 36°F - 46°F (2°C - 8°C).

You can store vaccine in one of two locations:

### Option 1: In a Separate Fridge

If you work a lot of events for us, it might be helpful to invest in a separate fridge designated solely to store vaccine. This type of fridge would need to be big enough to hold your vaccine and a few water bottles, which help maintain the temperature. For a full description of a CDC approved vaccination storage fridge, visit this toolkit.

### Option 2: On a Separate Shelf

If you are unable to invest in a separate fridge, you can store vaccine in a fridge you already own. Be sure the vaccine is allocated an entire shelf. Vaccine cannot share a shelf with any food or other items you regularly store in your fridge.

Do not store vaccine in a dormitory or bar style refrigerator, which is defined as a combination refrigerator/freezer unit that has one exterior door and an evaporator plate (cooling coil), generally located in the freezer. These types of units do not regulate temperature well and pose a significant risk of freezing vaccine.





## How to Store

No matter which option you choose as a storage location for your vaccine, all vaccine needs to be stored properly at all times.

Proper flu vaccine storage protocols:

- Store vaccine between 36°F - 46°F (2°C - 8°C), with a desired average temperature of 40°F (5°C).
  - If vaccine freezes or gets too warm its effectiveness may drop and vaccine may not be suitable for use.
- Store vaccine in a clean, dry container, such as a Ziploc bag or plastic tray.
- Store vaccine in center fridge space 2-3 inches from walls, floor, ceiling and vents.
  - Never store vaccine in fridge doors.
  - Never store vaccine in fridge drawers.
  - Never store vaccine on fridge floor.
  - Never store vaccine near vents.
  - Never store vaccine directly on glass shelf. Ensure there is a barrier (box, plastic tray, Ziploc bag, etc.) between vaccine and glass shelf.
- Avoid storing vaccine on the fridge's top shelf. If a top shelf must be utilized place water bottles close to the vent to serve as a barrier from the direct cold.
- Do not store vaccine in the provided Styrofoam cooler inside the fridge. This will actually keep the cold air from the fridge out of the cooler and away from the vaccine.
- Allow space between vaccine boxes to allow cold air circulation.
- Keep vaccine in original manufacturer packaging with boxes and lids closed.
- Keep the provided temperature indicator and thermometer with the vaccine at all times.
  - Store temperature indicator and thermometer in between or on top of vaccine boxes.
- Keep fridge door closed as often as possible to reduce the risk of temperature fluctuations and excessive light exposure.
- If you are working multiple TotalWellness flu shot events, make sure to label each allotment of vaccine with the event ID number to ensure you utilize the correct vaccine for each event. We recommend separating each event's vaccine into separate Ziplock bags and writing the event ID number on each bag.



## Monitoring Vaccine

In order to ensure the effectiveness of the vaccine you take to any given event, we ask that you monitor the vaccine while it's in your possession. Each vaccine shipment will include a TransTracker® CF, which serves as both a warmth and freeze indicator, and a thermometer.

The TransTracker® CF is utilized for vaccine transportation from TotalWellness to you, and from your back to TotalWellness. Its technology tracks the temperature over time. The top portion of the TransTracker® CF includes a warmth indicator called the LIMITmarker™ F-M which turns red or pink if the temperature gets too hot. The bottom portion of the TransTracker® CF includes a freeze indicator called the FREEZEmarker®. The FREEZEmarker® will turn cloudy or opaque if frozen.

When reading the TransTracker® CF make sure you are looking at the actual indicator and not the examples. As shown in the picture above, the TransTracker® CF includes examples of overheated and frozen below the actual indicators.

We ask that you monitor the temperature of the vaccine upon arrival and twice a day when you are home (morning and night) while the vaccine is in your possession. Upon arrival, utilize the TransTracker® CF to determine if your vaccine temperature has been properly maintained. Keep the TransTracker® CF with your vaccine at all times, at a temperature between 36°F - 46°F (2°C - 8°C). Also keep the provided thermometer with vaccine at all times. Be aware that the thermometer reading will quickly adjust to the air temperature. It is best to read the thermometer while it is inside the cooler or inside your refrigerator.

When transporting vaccine, we ask that you monitor the temperature when you remove the vaccine from your fridge to place it in the cooler, when you arrive at the event, once an hour while you are at the event, and before you return the vaccine to your fridge or TotalWellness.

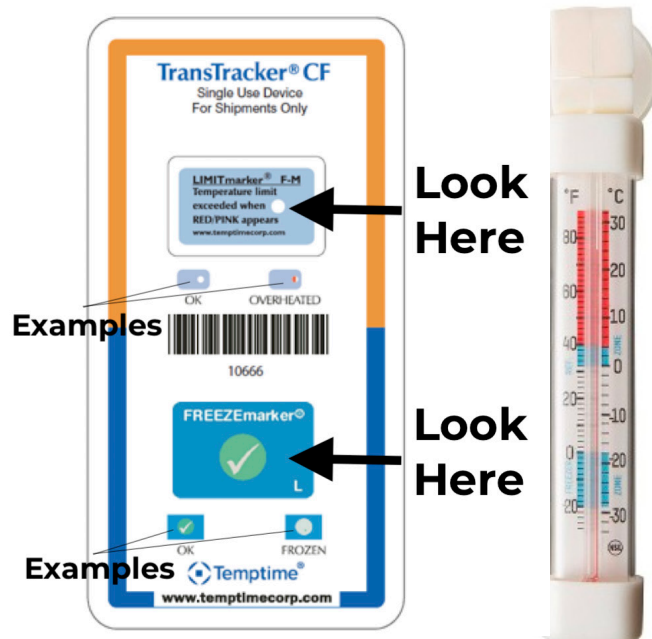
Document all vaccine monitoring information on the Vaccine Storage and Transport Log. The log will be included in your vaccine shipment. Record the date, time, temperature and status of the LIMITmarker™ F-M and FREEZEmarker® indicators on the Log.

- The thermometer should always be between 36°F - 46°F (2°C - 8°C).
- The LIMITmarker™ F-M circle should be white.
- The FREEZEmarker® should show a green circle with a white checkmark.

Return your completed log in your box when you return your vaccine. Be sure to return the log in the box and not in the cooler.

**Contact TotalWellness immediately at 402-964-0542 ext. 1210 if:**

1. The LIMITmarker™ F-M circle is pink or red.
2. The FREEZEmarker® green circle is covered with a cloudy, whitish, or opaque substance.



TotalWellness will contact the manufacturer to determine if the vaccine is still viable for use.

TotalWellness takes great care in monitoring the vaccine temperature while it is stored at our facility and we ask that you do the same while the vaccine is in your possession. It is your responsibility to ensure that vaccine has maintained the appropriate cold chain throughout the time it is in your possession.

## Transporting Vaccine

Prior to transporting vaccine, ensure you have selected the correct vaccine type and quantity for the event you are going to. Vaccine should be transported to and from events utilizing one of these two methods:

### Option 1: Portable Refrigerator

If you work a lot of TotalWellness flu vaccination events it might be wise to invest in a portable refrigerator that can be plugged into your vehicle and on-site at the event.

### Option 2: Hard-Sided Styrofoam Cooler

TotalWellness will ship vaccine to you utilizing a hard-sided Styrofoam cooler and cold packs. You can utilize the provided cooler and cold packs to transport vaccine to and from events.

When using the hard-sided Styrofoam cooler and provided cold packs be sure to condition the frozen cold packs by leaving them at room temperature for 1-2 hours until the edges have defrosted and the packs look like they have been sweating. This will help prevent the cold packs from freezing the vaccine.

TotalWellness utilizes specialized foam cold packs instead of traditional gel cold packs for events, so it is important to utilize the provided cold packs. When transporting vaccine always pack your cooler in the following manner:

**Cold Packs:** Place conditioned cold packs on the bottom of the cooler.

**Barrier:** Completely cover the conditioned cold packs by placing a minimum of eight layers of foam on the conditioned cold packs.

**Vaccine & Temperature Indicators:** Place vaccine on top of foam barrier. Place thermometer and temperature indicator in between boxes of vaccine. Never allow vaccine or temperature indicator to come in direct contact with the cold packs.

**Barrier:** Completely cover the vaccine with a minimum of eight layers of foam.

**Cold Packs:** Place conditioned cold packs on top of the foam layer.

**Filler:** Fill the cooler to the top with extra foam or paper.

This method should be utilized when transporting vaccine to and from events and when returning vaccine to TotalWellness. Always transport vaccine in the passenger compartment of your vehicle; never transport vaccine in your vehicle's trunk. Do not leave the cooler unattended. Keep it in your possession at all times. When the outside temperature is exceptionally hot or cold, take extra care to ensure the vaccine temperature of 36°F - 46°F is maintained.

Make sure you freeze and condition cold packs following longer events before shipping vaccine back to TotalWellness. This will ensure the cold chain is maintained in route.

## Partial Vials

If you have partial vials remaining after an event, label the vials with your initials and the BUD. You may keep partial vials to utilize first at your next TotalWellness event as long as the next event has ordered the same type of vaccine, you maintain the cold chain for the entire duration they're in your possession and as long as they're used before the BUD. When using partial vials at a TotalWellness event, be sure to utilize the partial vials before opening full vials. If you're not working other events, return partial vials to TotalWellness with any remaining full vials or unused manufacturer-filled syringes. If you only have partial vials of vaccine left and you do not have any upcoming TotalWellness events, you can dispose of the partial vials in your sharps container.

## The Event

---

While each event might vary based on the client's requests, there are some things you need to keep in mind for every single flu shot event.

## Participant Registration

Your Event Worksheet will indicate whether or not a registration station should be set up for your event. Most of our flu events do not need registration.

If you are providing flu shots at an event, do not require that the site contact act as a registration person. You are also not required to check participants in or track registrants versus walk-ins. A welcome table tent sign is provided in your Event Information packet. Display this sign to help provide instructions to participants.

If a client would like you to check participants in, let them know that checking participants in will slow down the event. Your main job at the event is to provide a safe flu shot and additional check in responsibilities could prevent you from doing this. Recommend that they put out a sign-in sheet. You can then instruct participants to sign themselves in prior to receiving the shot.

Many events will have lists of individuals who pre-registered for specific appointment times. The site contact will provide you with a sign-up roster if one is available for the site. Try to abide by the schedule as closely as possible, without slowing the flow of the event. Give individuals with appointments first priority and fit in walk-ins as you can. Ask walk-ins to come back toward the end of the event if you are concerned about having enough vaccine to vaccinate all individuals with appointments or if the walk-ins are causing extended wait times for other participants. It is also ok to ask individuals who come before their schedule appointment time to return at their scheduled time to receive their shot if there is a line forming.

Some events will include a registration person provided by TotalWellness. Registration personnel should assist the nurse(s) by checking in participants, monitoring the flow of the event, reminding participants to roll up sleeves, and making sure the consent form has been completed and signed by the participant prior to visiting the nurse. It is helpful if the registration personnel document the event ID number and date on the consent form. If only one lot of vaccine is available at the event, it is also helpful for the registration personnel to document the vaccine manufacturer and vaccine lot number on the consent forms. The administering nurse just needs to make sure to verify this information prior to administering the shot. Registration personnel should never document the injection site or write the nurse's name. Both of these fields must be completed by the administering nurse.



We require that a copy of the TotalWellness Privacy Practices Notice be available for participants to reference. It is not mandatory for participants to read it if they choose not to. A copy of the TotalWellness Privacy Practices Notice is provided in the Important Event Forms Packet and is also available online. We recommend displaying a copy at the registration table for easy participant access.

During registration, participants might ask questions about payment. Please note, we do not collect money at events. Clients will be invoiced for our services. If clients ask about pricing please inform them to contact their TotalWellness Sales Executive.

## Participant Care

Some participants get very anxious at the thought of receiving a flu shot. It is important for you to display confidence and create an environment that promotes security and trust. We recommend that you:

1. Introduce yourself to each participant.
2. Display a positive attitude through body language, facial expressions, and comments.
3. Use a calm tone of voice.
4. Make eye contact with the participant.
5. Be honest in explaining what to expect.

# Participant Screening

All participants need to be screened for contraindications and precautions prior to receiving a flu shot, even if he or she has received the flu shot before.

When participants arrive at your station, it is your responsibility to determine if the participant is a good candidate to receive the flu shot by reviewing the participant's answers to the questions on the Consent Form.

First, allow the participant to review the CDC's current influenza Vaccine Information Statement (VIS). A VIS is provided in the event information packet to display for participants. If participants would like to review the VIS in more detail, either provide a copy of the VIS or refer the participant to the CDC link listed on their consent form.

It is TotalWellness policy that we will only administer vaccinations to individuals 18 and older, or 19 and older in Nebraska and Alabama. In rare circumstances we will vaccinate children. In such cases the approved vaccination ages will be included on your Event Worksheet.

After verifying age and ensuring there are no questions about the VIS, proceed with the following steps for screening purposes.

- Make sure each participant's Consent Form is completed, signed and dated with questions answered and blanks filled in. Review the answers to the questions on the Consent Form.

## **Is this your first flu shot?**

- If no, assess their knowledge and experience.
- If yes, they should pay attention to how they feel after receiving the shot.
  - Allergic reactions are rare, but when you try something new you should be mindful.
- Regardless, the participant should remain at the event - or at least around people - for at least 15 minutes after the shot.

## **Have you ever had an allergic or serious reaction to a past flu or other vaccination?**

- If yes, **do not** administer the flu shot to the participant.

## **Are you allergic to any ingredient in the vaccine, or do you have any other severe allergies?**

- If yes, review the vaccine package insert to review vaccine ingredients, also review materials utilized to administer the vaccination (syringe, needle, gloves, Band-Aids, etc).
  - If the participant is severely allergic to any of the ingredients in the vaccine or any of the materials utilized for administration, do not administer the vaccination.

### **If female, are you pregnant?**

- If yes, check that the participant has discussed and received approval from their primary care provider to receive the vaccine. Only vaccinate pregnant women with preservative free vaccine (vaccine from manufacturer-filled syringes). If only multi-dose vials of vaccine are available at the event, inform the pregnant participant that she must visit her healthcare provider to receive the shot.

### **Have you been sick or had a fever above 101° F in the last 3 days?**

- If yes, **do not** administer the vaccination.

### **Have you ever had Guillain-Barré Syndrome?**

- If yes, **do not** administer the vaccination.

### **Have you had a physical exam in the past 12 months?**

- If no, remind the participant to maintain a relationship with a primary care physician.
- Verbally inform participants of potential side effects including:
  - Soreness and/or swelling at injection site
  - Mild flu-like symptoms/body aches
  - Allergic reaction such as hives and swelling—particularly around the mouth and eyes—itching, trouble breathing, etc.
    - Inform the participant that they should seek immediate medical attention if an allergic reaction occurs.
- Remind participants that they cannot get the flu from the flu shot.
- Ask participants if they have any questions (and be prepared to answer them, of course).
- Use your best professional judgment to determine if you should proceed.

If in doubt, don't give the shot! Refer the participant to his or her healthcare provider. If you refuse to administer - or an individual refuses to receive - the shot, you will need to complete an Incident Report and attach the report to the participant's Consent Form.



## Pregnancy

Experts consider the flu shot safe and recommend vaccination for pregnant women and breastfeeding women. It is TotalWellness policy to only vaccinate pregnant women with preservative free vaccine from manufacturer-filled syringes. We do not allow pregnant women to receive a flu shot drawn up from a multi-dose vial.

Pregnant participants should discuss flu vaccination with their primary care provider prior to receiving the vaccine. TotalWellness does not require a signed note from the physician, but does ask for a verbal confirmation from the participant that the shot has been approved by their physician.

TotalWellness allows breastfeeding women to be vaccinated at on-site events using vaccine from multi-dose vials or manufacturer-filled syringes.



## Preparing the Flu Shot

Once you've determined that the individual is a good candidate to receive the flu shot, you can continue on with the shot preparation. For the sake of transparency and as a method of involving participants in their own healthcare, we ask that you do not pre-fill any syringes or attach needles in advance.

Rather, we ask that you go through the necessary shot preparation steps verbally with the individual who will be receiving the shot. That way you are less likely to miss steps, the participant is more likely to feel comfortable, and there is a clear opportunity to ask and answer questions as they arise.



# Rights of Administration

Proper flu shot administration is a critical component of a successful vaccination program. The foundation for successful vaccine administration is the application of the “5 Rights of Medication Administration.” TotalWellness has expanded on this model to include additional items more specific to our events.

## Right Participant (Patient)

- Obtain a signed consent form that identifies both the participant’s name and the vaccine that is to be administered.
- Review the consent form to ensure the participant is an approved candidate for the flu shot meaning they’re in the appropriate age range, not sick, no contraindications (i.e. allergies, past reactions, etc.).

## Right Vaccine (Drug)

- Verify the identity of the vaccine that you are about to administer. Make sure it is flu vaccine and the correct type that has been ordered by the client. It is a medication error if you administer the incorrect type of vaccine at an event.
  - Quadrivalent from multi-dose vials
  - Quadrivalent from manufacturer-filled syringes
- Read the label of the vaccine and the package insert to ensure it is approved for the age group you are vaccinating.
- Read the label of the vaccine and the package insert to ensure it matches the written physician standing orders.

## Right Dose

- Draw up the correct dose according to the written protocols and standing orders. For adult flu vaccinations the correct dose is 0.5 mL.

## Right Route (of administration)

- The flu shot is an intramuscular (IM) injection typically administered in the deltoid muscle of adults.
- Ensure you are using the correct needle length.
  - For most adults utilize a 1-inch needle.
  - For larger participants utilize a 1½-inch needle.
- Ensure the needle length selection and insertion technique injects the vaccine into the thickest part of the muscle, without over-penetrating through the muscle and/or hitting the bone.

## Right Time

- Determine if this is the right time to administer a flu shot.
  - Is the participant due for a flu shot?
  - If the participant has received a flu shot in the past, ensure it was administered for coverage during the last flu season, not during the current flu season.
- Check the label to ensure the vaccine is not expired.
- Check expiration dates on all supplies to ensure they are not expired.
- Check the Beyond Use Date (BUD) to ensure the vaccine is still good to use if you are using a partial vial that was opened previously.

Also...

## Right Site

- Read the vaccine protocols and make sure you are administering the vaccination in the correct location.
  - For adult flu vaccinations the correct site to administer the shot is in the upside-down triangle of the deltoid muscle.
- Review the written protocols for properly identifying the deltoid muscle and placement of the vaccination.

## Right Documentation

- Complete the Nurse's Box on the Consent Form, including:
  - Event #
  - Event Date
  - Injection Site
  - Vaccine Brand
  - Vaccine Lot Number
  - Administering Nurse's Name and Title



# Site Preparation

Vaccines should be drawn up in a designated clean area that is not adjacent to areas where potentially contaminated items are placed. Wash your hands thoroughly or utilize the provided hand sanitizer before setting up your station.

Utilize the provided placemats to create a clean workspace where supplies can be set and easily accessed. Be mindful if you are right handed or left handed and set up your station accordingly. If you are right-handed, set up the sharps container to be on your right. If you are left handed, set up the sharps container to be on your left.

# Syringe and Needle Selection

A separate needle and syringe should be used for each injection. Always use one needle, one syringe, **only one time!** Never administer vaccine from the same syringe to more than one participant, even if the needle is changed.

Choose the correct syringe and needle based on the size of the individual. The needle should be long enough to reach the muscle mass and prevent vaccine from seeping into the subcutaneous tissue, but not so long as to involve underlying nerves, blood vessels, or bone. The table below provides general guidance; however, we ask that you utilize your best professional judgment when determining needle length.

Flu Shot Administration Needle Length Table		
Gender		Needle Length
Male	Female	
Up to 259 pounds	Up to 199 pounds	1 inch
260+ pounds	200+ pounds	1½ inch

TotalWellness sends 1mL, 1-inch needle VanishPoint® safety syringes and 3mL, 1½-inch needle VanishPoint® safety syringes to events with multi-dose vials of vaccine.

You can easily tell the difference between the two sizes of VanishPoint® syringes by looking at the **end of the plunger**.

The 1mL, 1-inch needle VanishPoint® safety syringe plunger ends are **clear**. The 3mL, 1½-inch needle VanishPoint® safety syringe plunger ends are **orange**. For more information on the VanishPoint® syringes visit [www.vanishpoint.com](http://www.vanishpoint.com).

TotalWellness sends 1-inch and 1½-inch safety needles when manufacturer-filled syringes are used. Always check syringe and needle expiration dates prior to use. Do not use if the product is expired.

# Vaccine Inspection

Each vaccine should be carefully inspected for damage or contamination prior to use and the expiration date should be checked. Only utilize vaccine that has been stored properly and is normal in appearance. Never use expired, damaged or contaminated vaccine.

## Filling Syringes

Put on a pair of new, clean gloves (one on each hand). Show participants the brand new supplies (needle, syringe, vial or manufacturer-filled syringe) and verbalize the steps as you prepare the shot.

Open all packaging in front of the participant and allow them to watch as you prepare all materials just prior to administration.

### Shots from Multi-Dose Vials

- Check the expiration and/or BUD date.
- Gently agitate the vial to mix thoroughly and restore suspension of the vaccine.
  - Vaccines are suspensions, like salad dressings, and can separate; so inverting the vial several times or rolling back and forth in your hands is a must to ensure the liquid is thoroughly mixed.
- Clean the rubber top of the vial with a new alcohol wipe before drawing up each dose.
- Open a new syringe with a new needle for each participant.
  - Never enter a vial with a used needle or syringe.
- Carefully remove the needle cap without contaminating the needle or inside of the cap.
- Draw back 0.5 mL ( $\frac{1}{2}$  mL) of air into the syringe.
- Inject the air into the inverted vial of vaccine and draw up 0.5 mL ( $\frac{1}{2}$  mL) of vaccine.
  - Verbalize the amount you are drawing up to the participant.
  - Allow the participant to watch as you draw up 0.5 mL ( $\frac{1}{2}$  mL) of vaccine.
  - Do not combine partial doses from separate vials into a single syringe.
- Remove any air bubbles from the syringe carefully to avoid losing vaccine.
- Allow the participant to verify that 0.5 mL ( $\frac{1}{2}$  mL) of vaccine has been drawn into the syringe.
- Administer the shot as soon as possible after filling.
- Some multi-dose vials include stickers that include the manufacturer name, lot number, and expiration date. The stickers can be accessed by gently pulling back the label on the vial. The sticker can be removed and placed in the Nurse's Box on the Consent Form. However, if using the sticker, be sure to complete the remaining fields in the Nurse's Box so all fields are complete.

## Shots from Manufacturer-Filled Syringes

- Check the expiration date on the manufacturer-filled syringe.
- Open a new manufacturer-filled syringe for each participant.
  - Manufacturer-filled syringes should never be used for more than one participant.
- Gently agitate the syringe to mix thoroughly and restore suspension of the vaccine.
  - Vaccines are suspensions, like salad dressings, and can separate so inverting the manufacturer-filled syringes is a must to ensure the liquid is thoroughly mixed.
- Manufacturer-filled syringes do not come packaged with an attached needle. You will need to attach one.
  - Carefully unscrew the grey cap on the manufacturer-filled syringe.
  - Attach the appropriate sized needle by carefully threading the needle onto the manufacturer-filled syringe and twisting it until it does not twist any further.
    - Do not uncap the needle until you are set to administer the vaccine.
  - Verbalize the steps and allow the participant to watch as you open packaging and attach the needle to the syringe.
  - Vaccine from a manufacturer-filled syringe should only be administered using an attached needle. Never transfer vaccine from a manufacturer-filled syringe to another syringe for administration.
- Administer the shot as soon as possible after attaching the needle.
- Manufacturer-filled syringes often come with a sticker attached to the syringe that contains the manufacturer name, lot number, and expiration date. The sticker can be removed and placed in the Nurse's Box on the Consent Form. However, if using the label, be sure to complete the remaining fields in the Nurse's Box so all fields are complete.

## Preparing the Injection Site

Ask the participant if he or she has an arm preference in which to receive the shot.

On the preferred arm, uncover the deltoid muscle (upper arm) and locate the center of the "upside-down triangle," 2-3 fingerbreadths (~2") below the acromion process. See illustrations on page 54.

If the participant is wearing a sleeved shirt, reach the site by having the participant pull his or her shirt down over the shoulder or push his or her sleeve up over the shoulder. If neither exposes the site sufficiently, have the participant remove his or her shirt in a private area.

Choose an injection site that is free of moles, bruises, scars, rashes and visible blood vessels. Wipe the injection site with a new alcohol pad in a circular and outward motion and wait for the site to dry.

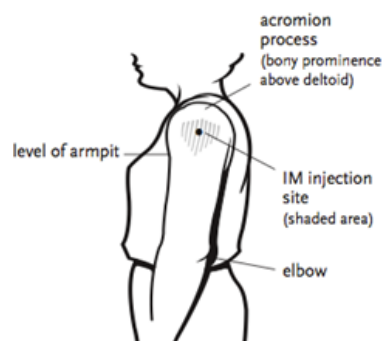
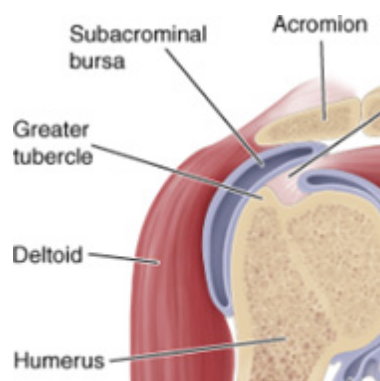
Mark the arm the participant will receive the shot in on the Consent Form in the Nurse's Box.

# Administration Technique

Flu shots are administered using the intramuscular (IM) route meaning that the injections are administered into the muscle tissue below the dermis and subcutaneous tissue. It is extremely important that you administer the correct 0.5 mL ( $\frac{1}{2}$  mL) dosage of flu vaccine. Larger than recommended doses can be hazardous and administering smaller than recommended doses might result in inadequate protection.

## **Please adhere to the following flu shot administration procedure:**

- Make sure the participant is seated.
- All shots should be administered at your (the nurse's) eye level, so it is recommended that you, the nurse, are seated when administering the vaccination.
- Ask the participant to get comfortable, sit still and relax his or her arm. The participant will feel less discomfort when relaxing the arm during injection.
- Be aware of symptoms that precede fainting such as weakness, dizziness, pallor, etc.
  - Provide supportive care and take appropriate measures to prevent injuries and embarrassment if such symptoms occur.
- Be sensitive to the comfort of the participant. If necessary, ask them to look away from the needle and envision they are on a beach.
- Double check the syringe for the correct dosage (0.5 mL), air bubbles, precipitate, etc.
  - You should only administer vaccines that you have prepared yourself.
  - You don't need to expel the air in manufacturer-filled syringes before administration.
- When the alcohol on the injection site is dry, isolate the muscle by stretching the skin taut between your thumb and forefinger to avoid injection into subcutaneous tissue. A technique for geriatric participants with very small arms is to grasp the tissue and 'bunch up' the muscle.
- Introduce the needle at a 90-degree angle with a quick thrust and advance as necessary into the thickest part of the muscle tissue. Insertion should be quick yet firm and steady.



Many nurses don't properly administer deltoid IM injections, so pay special attention to where and how deep you administer the vaccination. You'll need to reach the proper site so the vaccine is absorbed correctly. If you don't administer the vaccine properly, you might as well not give it at all. You've gone to a lot of trouble to keep your vaccine viable and the participant needs this protection. What a waste it would be for the vaccine not to be administered properly.



The proper site is where the green Band-Aid is on this man's arm. Be careful to not administer shots too high, too low, toward the back of the arm, or too deep.

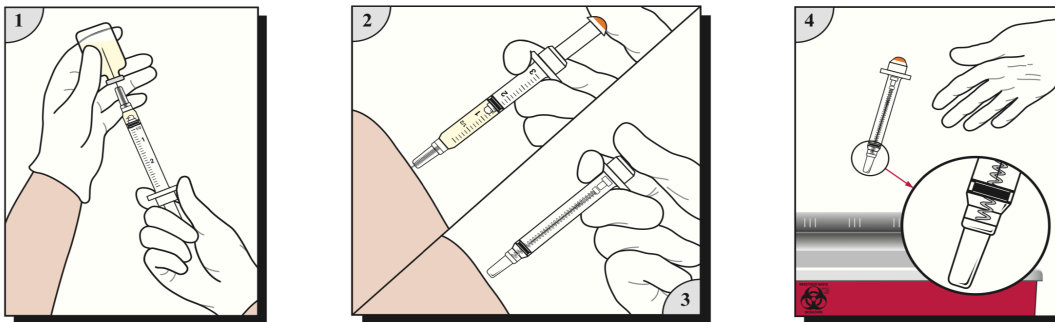
If administered incorrectly, it's likely that the vaccine is not injected into the muscle tissue and could cause damage. It's important that you administer the shot into the center of the deltoid muscle, away from blood vessels, nerves and bones.

**SIRVA:** As a contractor, you need to be aware of the risk of Shoulder Injury Related to Vaccine Administration (SIRVA). It's thought to result from the unintentional injection of a vaccine into tissues and structures underneath the deltoid muscle. While this is uncommon, SIRVA could lead to severe, persistent shoulder pain with restriction of function. It might include a diagnosis like bursitis, tendinitis, rotator cuff tear, frozen shoulder, impingement syndrome and/or adhesive capsulitis.

**Overpenetration:** You don't want to go all the way through the muscle, either. This happens if you go too deep (overpenetration). Be aware of how deep you're injecting a shot. Picture the tip of the needle in the center of the muscle every which way.

Overpenetration & SIRVA can create terrible outcomes for people just trying to protect themselves from the flu. To ensure the safety of participants, we want to reiterate the importance of injecting into the center of the muscle - from outside and inside the body.

- Inject the vaccine.
  - Aspiration before injection of vaccines (pulling back on the syringe plunger after needle insertion but before injection) is not necessary.
- Activate the safety device on the syringe/needle:
  - VanishPoint® Syringes with attached needles
    - While the needle is still in the participant's arm, continue depressing plunger to activate automatic needle retraction. You will hear a click when the safety mechanism has been activated.
    - Needle will automatically retract into syringe, preventing exposure to contaminated needle and rendering syringe non-reusable.
    - If you look closely at the syringe barrel, you will be able to see the needle. The needle did not “disappear” or “get stuck” in the participant's arm.



- Manufacturer-filled syringe with needle attached by nurse
  - Remove the needle from the participant's arm.
  - Push the lever arm forward until needle tip is completely covered.
  - Activate away from self and others.
  - Visually confirm needle tip is fully covered.
- Immediately dispose of the used syringe and needle into the provided sharps container.
  - Don't recap the needle prior to disposal.
  - Keep needles attached to manufacturer-filled syringes when disposing.
  - Always activate the safety mechanism before disposing of needles and syringes in the sharps container.
  - Keep your eyes on the needle continuously until it is placed into the sharps container.
  - Properly dispose of needles and syringes to prevent accidental needles stick injuries.
- Use gauze and instruct the participant to apply pressure.
- Apply a Band-Aid to the injection site.



# After Injection

<b>NURSE'S BOX</b>	Event #: _____	Event Date: _____
Injection Site:	<input type="checkbox"/> Right Arm <input type="checkbox"/> Left Arm	<input type="checkbox"/> Other: _____
Vaccine Brand:	<input type="checkbox"/> GSK-FluLaval <input type="checkbox"/> GSK-Fluarix	
	<input type="checkbox"/> Sanofi-Fluzone <input type="checkbox"/> Seqirus-Afluria <input type="checkbox"/> Seqirus-Flucelvax	
0.5 mL of Vaccine from Lot #: _____		
Nurse's Name & Title: _____		

Complete the Nurse's Box on the Consent Form including the event number, event date, injection site (right arm, left arm, or other), vaccine brand, vaccine lot number and your full name and title. Most vaccines include stickers with the specific vaccine information. Nurses are welcome to use the sticker as documentation for the vaccine brand and lot number.

Within the wording of the consent language TotalWellness identifies that the VIS has been made available online on the same date that the vaccination was administered. Additional information about the vaccine, including the expiration date, can be derived by the provided lot number. A reference to the current VIS publication is included in the consent language.

The Consent Form is a medical document and must be completed accurately and thoroughly. Failure to complete the Nurse's Box is a medication error. If Consent Forms are received with incomplete documentation, they will be returned to you to complete.

Keep each participant's Consent Form. All Consent Forms need to be returned to TotalWellness by the primary contractor.

Tell the participant thank you for allowing you to serve them today, and ensure all of his or her questions have been answered.

## Remember

It is your responsibility, as the nurse, to administer the flu vaccination correctly and document the vaccination appropriately. Remember to fully and accurately complete the Nurse's box on each consent form, vaccinate participants with 0.5mL of vaccine, utilize the correct vaccine ordered by the client, and return all consent forms, leftover flu vaccine and epinephrine to TotalWellness. Failure to complete these items may result in counseling, restriction from working future TotalWellness events, and possibly a report to the board of nursing against your license.

## *The One and Only Campaign*

The One & Only Campaign is a public health effort empowering participants and healthcare providers to insist on nothing less than safe injections – every time, for every participant. The campaign stresses One Needle, One Syringe, Only One Time. For more information visit <http://www.oneandonlycampaign.org/>.

# Flu Shot Verification

If a flu shot participant requires documentation that they received the shot he or she can:

- **Take a picture** of their completed consent form using their cell phone. This is the preferred method.
- **Complete two Consent Forms.** TotalWellness will keep one and the participant will keep the other.
- **Contact TotalWellness** after the event and we can fax or securely email the participant a

## State-Specific Requirements

Some states have specific requirements for nurses administering flu shots. If you are licensed and practicing in the following states, please adhere to these specific requirements.

### Georgia

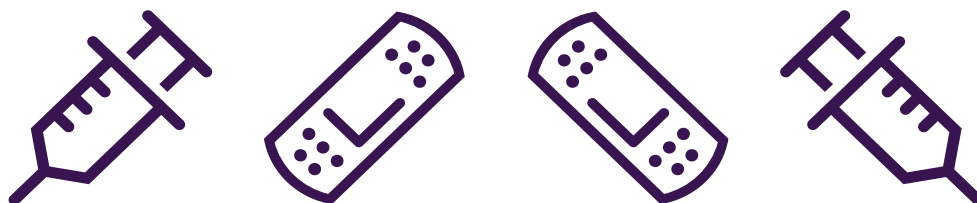
Nurses who administer vaccinations in Georgia are required to return signed and notarized standing orders to TotalWellness. TotalWellness will provide the standing orders in advance to give nurses administering shots in Georgia the opportunity to have the document notarized.

Most local banks offer notary services. Georgia nurses only need to submit one notarized version of the standing order per year. The signed, notarized standing order can be returned to TotalWellness with the event paperwork after the nurse's first event of the season.

The standing order included in the Important Event Forms Packet should be signed by all nurses at an event and returned to TotalWellness. That version does not need to be notarized.

### Nevada

The state of Nevada requires that an Immunization Registry opt out form be made available to participants who receive flu shots in the state. Copies of the opt-out form will be included in your shipment. Make the opt-out forms available, and collect completed opt-out forms.



# Emergency Procedures

We hope that every event runs smoothly, but unfortunately in any medical situation, emergencies are possible and need to be planned for. The primary contractor is responsible for communicating with the client site contact and all TotalWellness contractors so everyone is prepared for an emergency.

If an emergency occurs, the primary contractor will stay with the affected individual to keep him or her in a safe position while maintaining privacy. The primary contractor will designate others to notify the client site contact, and dial 911 if necessary.

In an intervention to any adverse reaction, get the individual to a safe position, and maintain that position. We only send epinephrine if flu shots are being administered. Epinephrine is not available for health screening only events.

An epinephrine injection (1:1000) must always be immediately available at all flu events in case an anaphylactic reaction occurs. Epinephrine is shipped to the primary contractor in a red tube.



## Anaphylactic Reactions and Shock

Anaphylaxis is a serious, potentially life-threatening allergic response that is marked by swelling, hives, lowered blood pressure, and dilated blood vessels. In severe cases, a person will go into shock. If anaphylactic shock isn't treated immediately, it can be fatal.

Anaphylaxis symptoms usually occur within minutes of exposure to an allergen. Sometimes, however, anaphylaxis can occur a half-hour or longer after exposure. Generally, the sooner the symptoms, the more severe the reaction.

Anaphylaxis symptoms may begin subtly and quickly progress to more serious symptoms. They include:

- Skin reactions, including hives along with itching, and flushed or pale skin (almost always present with anaphylaxis)
- A feeling of warmth
- The sensation of a lump in your throat
- Constriction of the airways and a swollen tongue or throat, which can cause wheezing and trouble breathing and/or swallowing
- A weak and rapid pulse
- Nausea, cramps, abdominal pain, vomiting or diarrhea
- Dizziness or fainting

## Intervention

It's important to be prepared for this type of emergency and make sure you have epinephrine readily available.

Reactions with delayed onset might give you time to question, observe, prepare and obtain a verbal consent to administer epinephrine. However, reactions can also occur immediately, so you need to be prepared to do the interventions simultaneously.

It's important that epinephrine is protected from light, so keep the epinephrine in the red tube until ready for use. Epinephrine should be stored at a controlled room temperature of 59°F - 86°F (15°C - 30°C). Do not expose epinephrine to extreme temperatures and do not refrigerate epinephrine.

Prior to the event start time, check the color and consistency of the epinephrine solution for particulate matter and discoloration. Do not use it if the solution is colored or cloudy, or if it contains particulate matter. Also, check the vial expiration date. Do not use it if expired.

### **Each red epinephrine tube contains the following:**

- 3 syringes (1mL, 1-inch VanishPoint® safety syringes) with needles attached
- Alcohol wipes
- 1 single dose vial of Adrenalin
  - TotalWellness sends single dose vials of Adrenalin (epinephrine injection, USP) 1 mg/mL, 1:1000. Each single dose vials contains 1mL of epinephrine solution
- Administration instructions

# Anaphylactic Response Steps

1. Check and maintain airway, breathing and circulation throughout intervention.
2. Designate someone to call 911/EMS and someone to clear the room for privacy.
3. Maintain the individual in a safe position, flat on his or her back. If the individual is having trouble breathing the head may be elevated provided blood pressure is adequate to prevent loss of consciousness. If blood pressure is low, elevate legs.
4. Invert vial to re-suspend the epinephrine.
5. Carefully remove vial cover to expose rubber top without contaminating it.
6. Wipe rubber top with alcohol and allow to dry.
7. Carefully remove syringe cap without contaminating the needle or inside of cap.
  - Epinephrine kit is supplied with a 1 mL syringe with an attached 1-inch needle.
8. Draw up the appropriate dose of epinephrine.
  - Adults 66 pounds or more: 0.3 mL to 0.5 mL, with a maximum single dose of 0.5 mL.
9. Remove any air bubbles from the syringe carefully to avoid losing any of the epinephrine solution.
10. Administer the epinephrine into the anterolateral aspect of the thigh, intramuscularly, using appropriate administration technique.
  - Don't administer the injection into the buttocks.
  - Administer the injection through clothing if necessary.
11. Properly dispose of the needle and syringe in the sharps container.
12. Massage the site to counteract possible vasoconstriction and to enhance absorption.
13. Monitor the individual until EMS arrives. Perform CPR if necessary.
14. If symptoms persist or become worse, you can repeat the epinephrine dose every 5 to 10 minutes up to 3 doses depending on the participant's response. The EMS usually arrives before that is necessary.
  - You may draw up additional doses from the same single-dose vial as long as all doses drawn up from the vial are administered to the same participant and are only used for this single case/procedure.
  - Use a new syringe with a new needle for each repeated dose.
  - Do not administer repeated injections at the same site, as the resulting vasoconstriction may cause tissue necrosis.
  - Discard the vial at the end of the procedure and do not store for future use.
15. Fill out an Incident Report for our TotalWellness records and call TotalWellness at 402-964-0542 to report the incident. Make note of the epinephrine lot number on the Incident Report. If applicable, submit a VAERS report.

# Vasodepressor Reactions/Vasovagal Syncope and Panic Attacks

Sometimes vasodepressor reactions/vasovagal syncope and panic attacks are confused with anaphylactic reactions. Vasodepressor reactions/vasovagal syncope and panic attacks are physiological responses to stress. That means the person is reacting to the stress of the service provided such as the physical injection, rather than the contents of the vaccine.

Be sure to distinguish between this physiological reaction, and anaphylaxis because the treatment for anaphylaxis - epinephrine - can make the anxiety of a vasodepressor reaction or panic attack worse.

Symptoms of vasodepressor reactions/vasovagal syncope can include:

- Fainting
- Pallor
- Weakness
- Hypotension
- Sweating
- Nausea
- Sometimes vomiting

Vasodepressor reactions/vasovagal syncope are characterized by a slow heartbeat (usually under 60 bpm), but cutaneous symptoms such as swelling, hives, itching and flushing won't be present. The skin usually appears pale, cool and moist. Remember these characteristics when distinguishing between reactions.

Panic attacks might include:

- Anxiety
- Feelings of intense apprehension or terror
- Dizziness
- Sweating
- Shortness of breath
- Chest pain or palpitations

None of the other symptoms of anaphylaxis, such as wheezing or itching, will be present in a panic attack. Keep that in mind when distinguishing between the two.

## Intervention

If possible, have the individual lie down on his or her back with his or her feet elevated. Tell the participant to take slow, deep breaths. Have someone stay with him or her to maintain a safe position, provide comfort and place cool paper towels on the individual's forehead.

Complete an Incident Report and return it to TotalWellness. Vasodepressor Reactions/Vasovagal Syncope and Panic Attacks can happen at both health screening and flu shot events.

# Exposure Control Plan

---

TotalWellness is committed to providing a safe and healthy work environment. In pursuit of this endeavor, we have developed an exposure control plan. The plan is housed at the TotalWellness headquarters and is available upon request.

The most common on-site exposure to bloodborne pathogens is when a nurse accidentally sticks herself with a used needle. If this happens, follow the steps below.

1. Remain calm.
2. Politely excuse yourself and inform the involved participant and site contact that a needle stick injury has occurred.
  - Ensure the participant understands that you, the nurse, are the one at risk.
3. Encourage bleeding of the site and clean it thoroughly with soap and water.
4. Fill out an Incident Report and attach it to the involved participant's Consent Form. Send both back to TotalWellness with the rest of the completed Consent Forms.
5. After your event is complete, call TotalWellness at 402-964-0542 to report the incident and receive further instruction.

## Vaccine Adverse Event Reporting System (VAERS)

---

In an effort to assist the CDC and FDA to monitor the safety of all vaccines, any suspected adverse reaction to a flu shot will need to be reported by the nurse who administered the vaccination to the Vaccine Adverse Event Reporting System (VAERS) at the U.S. Department of Health and Human Services (DHHS). VAERS reports can be submitted at <https://vaers.hhs.gov>.

A copy of the VAERS submission confirmation should be sent to TotalWellness along with the incident report and participant's Consent Form.

# Thank You!

Again, we appreciate your time and commitment to TotalWellness. You're an essential part of the work we do for employees all over the country. If you have any questions about your duties as a contractor, don't hesitate to reach out to us, and welcome aboard!

## Questions?

Please don't hesitate to contact us with any questions you have about working events with TotalWellness.

TotalWellness

9320 H Court | Omaha, NE 68127

[rns@totalwellnesshealth.com](mailto:rns@totalwellnesshealth.com)

402.964.0542

*Get Connected!*



TOTAL**WELLNESS**



# Appendix A

TotalWellness Event Worksheet



Event ID #

61087

## Test-Omaha

Test

Test

December 31, 2024 | 8:00 AM - 5:00 PM

Event Location**Building Name 123**

Room/Floor 123

9320 H Court

Address Line 2

Omaha, NE 68127

# Contractors: 5

Arrival Time: 7:00 AM

Break Time: 12:00 PM - 1:00 PM

Rotating Break: 30 minutes

Services: 100 shots, 130 tests

**Do not call the client:** If you have questions or concerns related to this event, call TotalWellness at 888-434-4358.**Dress Code:** Abide by the conservative dress code outlined in the manual (solid black scrub top, solid black scrub pants, collared white lab coat, and black close-toed shoes). TotalWellness name tags will be included in shipments to the Primary Contractor.**Contact Information**TotalWellness Primary Contractor**Test Contractor**

Home:

Mobile: 000-000-0000

Email: test@totalwellnesshealth.com

Client Site Contact**Site Contact**

Phone: 000-000-0000

Backup Site Contact**Backup Site Contact**

Phone: 111-111-1111

TotalWellness Account Manager:**Test User**

Email: Test@Testing.com

Phone: 000-000-0000

TotalWellness Scheduler:**Test User**

Email: Test@Testing.com

Phone: 000-000-0000

**Contractors****Name****License**

Test Contractor

RN

Biometric Package		130 tests	16.25 tests/hr	4 Pods
Service Name		Stations	Quantity	
Blood Pressure		4	130	
Counseling		4	130	
Body Composition		4	130	
Height/Weight, BMI, Waist Circumference				
Fingerstick (CardioChek)		4	130	
Fasting Lipid & Glucose (TC, HDL, LDL, Trigs, Ratio, Glu)				
Onsite Data Collection		4	130	

Screenings			
Service Name		Stations	Quantity
Registration/Admin		1	
Coordinator		1	

**Notes:** Additional Service Notes go here.

Flu Shots		1 stations
Type		Quantity
Privacy Screens		1
Quadrivalent from manufacturer-filled syringes		100
Quadrivalent from multi-dose vials		0

**Notes:** Sample Vaccination Notes.  
Utilize Preservative Free shots for Pregnant Women.

Paperwork	
Paperwork	Provided By
Biometric Results Booklet	TW
Flu Consent Form - English	Client
Flu VIS	Client
TW Standard Part. Sat. Survey	TW

## Notes

Secondary Contractor Notes:

Secondary Contractor Notes go here. All staff should review these notes.

Driving & Parking:

Driving and Parking Directions are included here.

Shipping Notes:

Shipping Notes go here.

Entrance & Security:

Entrance and Security Information are included here.

Site Demographics:

Site Demographic information is included here.

Program Details:

Program Details are included here.

## Onsite Data Collection

Site:	<a href="https://data.totalwellnesshealth.com/Agency">https://data.totalwellnesshealth.com/Agency</a>
Password:	XXXXXXXXXX

**Physician's Standing Orders:** Flu shot and epinephrine standing orders are accessible online and will be included in the shipment to the Primary Contractor.

Have an excellent event and thank you for all you do for TotalWellness!  
If you have any questions or problems, please call 888-434-4358, ext. 100.

Thank you!  
- TotalWellness

# Appendix B

TotalWellness Conduct Agreement

# TotalWellness Conduct Agreement

Hello. We're TotalWellness. Welcome to the team!

First of all, thank you for working with us. At TotalWellness, we're all about creating a positive and memorable experience for each and every participant. To achieve this, it's extra important that we're all on the same page.

Please review these key points so you know what we expect from you as a TotalWellness contractor. If you have any questions, don't hesitate to get a hold of us. Enjoy!

## *Conduct Yourself Appropriately & Professionally*

- Always put the participant first. When a participant arrives ensure all side conversations stop and all attention is directed toward the participant.
- Interact with participants in a friendly, positive manner.
- Don't ask for or accept food, drinks, health fair giveaways, prizes or anything else from the client.
- Don't participate in any of the services or activities intended for the event participants. This includes eating or drinking things provided for them.
- Provide services efficiently. Participants usually have appointments for specific durations, so it's important to keep to their schedule and respect their time.
- It's important to be personal and friendly, but health screenings and vaccinations are about the participant, so give them the attention they deserve rather than discussing you, your problems, solutions, etc.
- Keep your cell phones, computers, tablets, earbuds and all other personal devices turned off and tucked away.
- Keep food away from your workstations. Bottled water is fine, but eating while working is not.
- Always maintain confidentiality. Avoid speaking personal information aloud. It is always best to write this information or refer to it on paper and be mindful of your surroundings when discussing any participant information.
- Similarly, consent forms must be returned to us. Don't allow employers to keep consent forms, as this is a HIPAA violation. Don't allow participants to keep their original consent form. If they need a copy of their consent form, recommend that they take a picture of it.



## Maintain Consistency with the TotalWellness Image

- Exude a healthy attitude when working our events. Please don't show up to events ill, smelling of smoke, or generally unclean and disheveled.
- Alcohol, illegal drug, and tobacco use, including smoking, vaping, or chewing are not allowed at, immediately before, or immediately after our events. If you work an event smelling of smoke or under the influence of drugs or alcohol you may be asked to leave and/or will not be scheduled for future events.
- Demonstrate the five TotalWellness Brand Attributes:
  - **Motivating:** give positive feedback to participants
  - **Approachable:** make participants feel comfortable with a smile and warm hello
  - **Ally:** be helpful and work as a team to find solutions
  - **Seasoned:** take ownership, be prepared and provide the work of an expert
  - **Passionate:** show energy and excitement in your body language, words, tone, etc.
- Be familiar with the TotalWellness paperwork, procedures and brand image before working an event. All documents can be found in the TotalWellness Scheduling System.

## Be a Good Teammate

- Avoid taking unannounced breaks. If you need to take a break that isn't scheduled, communicate with your Coordinator/Primary Contractor to be sure your position is filled.
- Don't switch work positions with other contractors. If you need to switch duties (only to a job you've been trained for), get approval from your Coordinator/Primary Contractor.
- Don't doubt equipment or procedures in front of participants. This will only make them uncomfortable. If you have issues, report them to your Coordinator/Primary Contractor in a private, confidential manner.
- Assist with event setup and clean up at the direction of the Coordinator/Primary Contractor.
- Your leader on site is the Coordinator/Primary Contractor. In no circumstances should you report issues/results/changes/etc. to the client or company where the event is taking place.
  - If there is a problem with an individual, let us know after the event. (Email: [rns@totalwellnesshealth.com](mailto:rns@totalwellnesshealth.com); Phone: 402-964-0542 x1210)

We hope you enjoy working with us. We're glad you're here, and we appreciate the time and effort you put in to helping us create healthier, happier workplaces!



# Appendix C

TotalWellness Participant Experience



# Participant Experience

## Procedure



Whether providing services in a station-to-station model or pod format, the participant experience encompasses four major components – 1) Welcome, 2) Ask don't Tell, 3) Watch for Signs, and 4) Guide to Next Station/Service. The goal is to ensure participants feel welcomed and encouraged when starting the screening. We want them to feel educated and that they received valuable information after completing the screening.

### Welcome

- Welcome the participant and introduce yourself.
- Explain the service(s) you will be providing.

### Ask don't Tell

- Ask the participant to complete steps, instead of telling them.
  - Ask the participant to remove their shoes and heavy items from pockets prior to height/weight measurements.
  - Ask the participant which arm they would like to use for blood pressure and/or venipuncture services.
  - Ask the participant which hand and finger (one of the center fingers) they would like to use for finger-stick services.

### Watch for Signs

- If a participant seems to be questioning a value, offer to retest the value.
  - Ensure the participant knows you are retesting because you want to double check the number, not because the equipment is inaccurate or faulty.
  - Ensure the participant walks away from the service feeling they received accurate, valuable information. Make sure they don't walk away thinking their values are incorrect or that results were not explained thoroughly.
- If a participant seems apprehensive or nervous about receiving a service, give them time to relax and regroup prior to providing the service.

### Guide to Next Station/Service

- Guide the participant to the next station/service ensuring they know what is being offered next and where to go to participate in the service.

### Finger-Stick Pod Service Delivery

When administering screenings in a pod format it is important to do the finger-stick blood test first. This allows you to provide other services while the machine is processing the blood sample.

### Electronic Onsite Data Collection

When a client is utilizing electronic onsite data collection with iPads, it is important to write all values on the participant's handout prior to entering the data into the iPad. That way you always have the data written down in case you need to re-enter the information into the iPad.

### Participant Satisfaction Surveys

At most screening events, participants will be asked to complete a paper or electronic participant satisfaction survey. Always provide the participant with privacy to complete the survey. Either step out of your station or have surveys setup in a separate, private area. Participants are not required to complete the survey, but we do require that you offer them the option to complete it.

# Appendix D

TotalWellness Station  
Setup Procedure

# Pod & Station Setup

## Procedure



### Station-to-Station vs. Pod

Biometric screening services will either be delivered in a station-to-station model or a pod format. Your worksheet will indicate the intended format. With the station-to-station model participants partake in one service per station. For example, the participant visits the height/weight/BMI/waist station. After receiving those measurements, he or she visits a different station to have his or her blood pressure checked.

In a pod format all biometric screening services are offered at one station, by one contractor. When administering screenings in a pod format it is important to do the finger-stick blood test first. This allows you to provide other services while the machine is processing the blood sample.

### Station Setup

#### Registration Station

Setup the registration station with one table and one chair for the TotalWellness contractor and one table with several chairs for participants to complete the consent form. With electronic data collection events, setup one chair for the TotalWellness contractor and one to two chairs across the table for participants. Have consent forms available at the station. Display a copy of the TotalWellness Privacy Practices Notice at the station along with a copy of the flu Vaccine Information Statement (VIS), if applicable. A copy of the TotalWellness Privacy Practices Notice can be found online at <https://www.totalwellnesshealth.com/privacy-notice/>.

#### Height, Weight, Body Mass Index (BMI) & Waist Circumference Station

Setup each station with one stadiometer, one scale, one flexible tape measure, one BMI chart, one clipboard and two or three privacy screens. Setup the stadiometer against a wall. Place the scale on a hard surface, if available, and in a manner making it easy for you to see the display but difficult for others to see the display. Test both the stadiometer and scale to ensure both are measuring properly. Setup two or three privacy screens around the station creating a "U" shape, making the station as private as possible. Setup one chair inside the station for each participant to utilize.

#### Blood Pressure Screening Station

Setup each station with one adult size cuff, one large adult size cuff and two chairs facing each other. Up to two stations can be setup per table, as long as stations are setup on opposite ends. Privacy screens are not generally provided for blood pressure stations. Do not leave cuff cases on table, store under table or in shipping boxes.

#### Finger-Stick Cholesterol & Glucose Screening Station

Setup each station with one CardioChek® device, CardioChek® Plus Lipid test strips & eGlu test strips, lancets, capillary tubes, sharps container, biohazard bag, gauze, alcohol swabs, bandages (Band-Aids), gloves, placemats, sanitizing wipes, and hand sanitizer. Split the quantity of supplies evenly between each station. Up to two stations can be setup per table, as long as stations are setup on opposite ends.

Equip each station with two chairs. It is recommended that the chairs face each other, without the table in between. We generally do not provide privacy screens for finger-stick cholesterol and glucose stations. Store equipment boxes and other materials under the table or in shipping boxes. If extra CardioChek® devices are available, distribute them evenly between the stations.

#### Venipuncture Blood Draw Station

Setup each station with blood draw kits, butterfly needles, supplemental supply packs, sharps container, biohazard bag, tourniquet, placemats, hand sanitizer and centrifuge. Split the quantity of supplies evenly between each station. Stations may have to share a centrifuge and ensure the centrifuge is always on a hard, level surface. Up to two stations can be setup per table, as long as stations are setup on opposite ends.

Equip each station with two chairs. It is recommended that the chairs face each other, without the table in between. We generally do not provide privacy screens for venipuncture blood draw stations. Store equipment boxes and other materials under table or in shipping boxes.

## **Results Review Station**

Setup each station with one table, two chairs, one to three privacy screens, and all necessary paperwork that needs to be distributed. Try to place the tables against a wall and make the stations as private as possible. It is recommended the chairs face each other, without the table in between.

## **Finger-Stick Pod Station**

Setup each pod with one stadiometer, one scale, one flexible tape measure, one BMI chart, one clipboard, one adult size cuff, one large adult size cuff, one CardioChek® Plus device, CardioChek® Plus Lipid test strips & eGlu test strips, lancets, capillary tubes, sharps container, biohazard bag, gauze, alcohol swabs, bandages (Band-Aids), gloves, placemats, sanitizing wipes, hand sanitizer, and participant handouts.

Equip each station with one table, two chairs, and two to three privacy screens. Setup the stadiometer against a wall. Place the scale on a hard surface, if available, and in a manner making it easy for you to see the display but difficult for other participants to see the display. Setup the chairs facing one another, without the table in between. Setup two or three privacy screens around the station creating a “U” shape, making the station as private as possible. Store equipment boxes and other materials under the table or in shipping boxes.

## **Venipuncture Pod Station**

Setup each pod with one stadiometer, one scale, one flexible tape measure, one BMI chart, one clipboard, one adult size cuff, one large adult size cuff, blood draw kits, butterfly needles, supplemental supply packs, sharps container, biohazard bag, tourniquet, placemats, hand sanitizer, and participant handouts. With venipuncture pod events, the centrifuge will generally be setup in a separate area, so pods can share. Ensure the centrifuge is always on a hard, level surface.

Equip each station with one table, two chairs, and two to three privacy screens. Setup the stadiometer against a wall. Place the scale on a hard surface, if available, and in a manner making it easy for you to see the display but difficult for other participants to see the display. Setup the chairs facing one another, without the table in between. Setup two or three privacy screens around the station creating a “U” shape, making the station as private as possible. Store equipment boxes and other materials under the table or in shipping boxes.

## **Electronic Onsite Data Collection**

At events with onsite data collection, also equip each station with an iPad. Each contractor should keep their iPad at their designated station.

## **Station Modifications**

At times you may need to modify your stations, due to supply or space shortages.

- Registration can be completed within a pod, if the event has a low hourly throughput, if you are short a contractor, or if you do not have enough iPads to have one at registration.
- Height/Weight stations may need to be shared if equipment or space does not allow each pod to have their own stadiometer and scale. Ensure privacy screens surround the height/weight station and always check to make sure the station is not occupied prior to entry when sharing a station.

# Appendix E

## TotalWellness Registration Procedure

# Registration

## Procedure



### Supplies

- Pens
- Consent Forms
- TotalWellness Privacy Practices Notice
- Participant Roster (if applicable)
- Flu Vaccine Information Statements (if applicable)

### Definition & Purpose

The registration station is designed to welcome, check-in, and guide participants. If the site contact has provided you with a roster, check off individuals as they arrive at the event. Write in the names of individuals who did not sign up for the event and include the time they attended. At the end of the event verify that the quantity of individuals you have listed on the roster matches the quantity of consent forms collected/records entered into the iPad. Distribute consent forms to participants and assist with participant questions about the consent form.

It is also helpful for registration personnel to assist with crowd control and the completion of consent forms. The event ID and date can be filled in by registration personnel on all consent forms. On flu shot consent forms, registration personnel can also document the vaccine brand and lot number, if the same lot is being used for the entire event. Registration personnel should verify that consents are completely filled out by the participant prior to participating in the screening or flu shot service. Additionally, they should remind flu shot participants to roll up long sleeves prior to visiting the nurse.

### Implementation

#### Welcome

- Welcome the participant and thank them for coming.
- Mark the participant off on the appointment roster, if applicable.

#### Consent Form

- Provide a copy of the consent form and instructions on how to complete.
  - Allow the participant to leave the unique ID field blank if they don't know their unique ID or if they aren't comfortable providing the information.
- For events with electronic onsite data collection:
  - Lookup the participant in the iPad using date of birth.
  - Verify three data points with the participant (first name, last name, date of birth and/or unique ID).
  - After selecting the correct participant, click on Enter Readings.
  - Pass the iPad to the participant so they can read through the consent language, answer the screening questions, and sign the form.
- Fasting means not eating or drinking anything (except water) for at least 9 hours prior to the screening.

#### Next Steps

- Guide the participant to the first station or an open pod.
- Ensure the participant knows where to go and what to do next.
- If using paper consent forms, have the participant take their consent form with them.

### Important Tips

- If a participant asks you a question about their program and you don't know the answer direct them to their HR representative or the TW Primary Contractor.
- Accommodate scheduled appointments first and walk-ins as you can.
  - If walk-ins are causing a wait/service delay, ask walk-ins to return near the end of the event.
- Fill in the event ID number and date on paper consent forms.
- Document the vaccine brand and lot number on flu consent forms if the same lot is being used for the entire event.
- Assist with crowd control.
- Remind flu shot participants to roll up long sleeves.

# Appendix F

TotalWellness BMI, Height, Weight  
and Waist Circumference  
Clinical Screening Procedures

# Height, Weight, Body Mass Index (BMI) & Waist Circumference

## Clinical Screening Procedure



### Supplies

- Stadiometer
- Scale
- Flexible Tape Measure
- BMI Chart
- Clipboard
- Privacy Screens

### Definition & Purpose

- Body Mass Index (BMI) – Number calculated from a person's height and weight. It is used to identify potential health risks due to being overweight or underweight.
- Waist Circumference – Measurement of the distance around the abdomen used to assess abdominal fat. If most of a participant's fat is around the waist rather than the hips the participant is at higher risk for heart disease, certain cancers, and type 2 diabetes.

### Measurement

#### Height

- Ask participant to sit down and remove shoes, hats should also be removed.
  - If the participant is uncomfortable removing their shoes, allow them to keep their shoes on.
- Ensure participant is standing straight with their back against the stadiometer post.
- Move stadiometer platform until it touches participant's head.
  - Ensure platform is touching the top of the head and not just the top of the participant's hair.
- Record reading rounding to the nearest inch (round down at .4 inches and under, round up at .5 inches and over).
  - Make sure you record the reading where the red arrows point on the stadiometer.
  - Generally, you will record the reading in feet and inches, meaning 5 feet 6 inches.
  - This may require you to convert total inches to feet and inches (remember there are 12 inches in 1 foot).

#### Weight

- Participants should remove shoes, hats, and anything heavy out of pockets.
- To turn on the scale, tap on scale until scale displays 0.00.
- Ask participant to stand on scale.
- Record reading rounding to the nearest pound (round down at .4 lbs and under, round up at .5 lbs and over).

#### BMI

- Determine BMI by looking at the BMI chart.
- For individuals not on the chart, calculate their BMI using the BMI formula listed on the BMI chart.

#### Waist Circumference

- Have participant place the tape measure end at their belly button, on the lowest layer of clothing.
  - Make sure the participant places the zero end of the tape measure at his/her belly button.
- Instruct the participant to spin in a circle, so the tape measure wraps around him/her.
- Ensure that the tape measure is snug but does not push tightly into the skin.
- Measure waist circumference as participant is breathing out normally; ensure the participant does not "suck in" the stomach.
- Read the tape measure and record the waist circumference in inches, rounding to the nearest inch (round down at .4 inches and under, round up at .5 inches and over).
  - The flexible tape measure includes inches on one side and centimeters on the other side, make sure you utilize and record inches.



## Interpreting Results

Category	Underweight	Normal	Overweight	Obese
BMI	< 18.5	18.5 – 24.9	25 – 29.9	30 +

Category	Men Normal	Men Increased Risk	Women Normal	Women Increased Risk
Waist Circumference	40 inches or less	40.1 inches or more	35 inches or less	35.1 inches or more

### Pregnant Woman Policy

The participant consent form will indicate if the participant is pregnant or not. If the participant is pregnant measure her height and weight. Do not calculate BMI or measure waist circumference on pregnant women.

### Important Tips

- When measuring height be advised that many individuals have taken their height in the past with their shoes on. Without shoes it is logical that the participant may lose .5 inches – 1 inch.
- If a participant questions a value, re-test it. Ensure the participant knows you are re-testing as a double check and not because of faulty or inaccurate equipment.
- BMI is not always a reliable measure of health. It does not consider a person's muscle or bone mass.
- When measuring waist circumference ensure you are measuring at the belly button and not around the hips.
- Waist circumference is not the same as pant size.

# Appendix G

TotalWellness Blood Pressure  
Screening Clinical Procedure

# Blood Pressure Screening

## Clinical Procedure



### Supplies

- Stethoscope
- Sphygmomanometer blood pressure cuffs (Adult and Large Adult)

### Definition & Purpose

Blood pressure is the force of blood pushing against artery walls. It is expressed by two numbers. The top number is the systolic blood pressure, the pressure blood is exerting against artery walls when the heart beats. The bottom number is the diastolic blood pressure, the pressure blood is exerting against artery walls while the heart is resting between beats. Maintaining proper blood pressure lowers risk for heart disease, stroke, and kidney failure.

### Measurement

- Participant should sit in a chair, with feet on the floor, and arm supported at heart level.
- Ask the participant which arm they would like to use and utilize that arm.
  - TotalWellness does not require a specific arm to be used.
- Ask the participant if they have had their blood pressure taken in the past and if they remember what their last reading was.
  - If the participant provides you with a last known reading, inflate the blood pressure cuff at least 30 mmHg above the known systolic blood pressure.
  - If the participant does not provide you with a last known reading, inflate the blood pressure cuff to 180 - 200 mmHg for your first reading.
- Kindly remind the participant to face forward, both feet on the floor, and relax.
- Select appropriate-sized cuff (with cuff bladder encircling at least 80% of the arm) to ensure accuracy.
  - Each blood pressure cuff includes an index and a range, make sure the index arrow is within the indicate range.
- Wrap the cuff around the upper arm with the cuff's lower edge one inch above the crease of the elbow.
  - Make sure the arrow on the cuff is aligned with the brachial artery (the artery on the inside of the arm, opposite the elbow).
- Physically palpate the participant's arm to locate the brachial artery. Lightly press the stethoscope's bell on the brachial artery.
- Close the thumb valve and rapidly inflate the cuff to 180 – 200 mmHg or 30 mmHg over the participant's known systolic blood pressure.
  - Each line on the sphygmomanometer is 2 mmHg.
- Open the pressure control valve and smoothly release air from the cuff at a slow rate (2-3 mm Hg/sec, about one mark per second).
- Listen with the stethoscope and simultaneously observe the sphygmomanometer.
  - When watching the sphygmomanometer note the reading at the point when the pulse sounds (Korotkoff Sounds) first appear.
    - The sound should be a clear tapping noise.
    - Listen for at least two beats to eliminate recording a single erroneous sound.
    - Note the reading at the point when the first pulse sound appears, not the second beat.
    - The reading on the sphygmomanometer when the first pulse sound is heard is the systolic blood pressure.
      - If Korotkoff sounds are heard immediately after releasing the pressure control valve you may need to pump cuff up higher than 200 mmHg to get an accurate reading.
  - Continue steady deflation at 2-3 mmHg/sec and note the reading at which the last pulse sound is heard. The point at which the sounds completely disappear is the diastolic blood pressure.
    - The last pulse sound will likely sound muffled and soft.
  - Continue steady deflation at 2-3 mmHg/sec for at least 20 mmHg below the final reading and then open the pressure control valve completely to release all the remaining air.
- Remove the cuff from the participant's arm.
- Write results on participant results handout.
- Document results on paper consent form or within the participant's electronic record on the iPad.

### High Blood Pressure Referral Protocol

If a participant has an initial blood pressure reading of 130/80 mmHg (either value elevated), additional readings, up to three, must be taken. On the second reading, switch cuff to the opposite arm and make sure the participant is sitting with legs uncrossed. If the participant's blood pressure falls below 130/80 mmHg, record the second (lower) reading on the participant's paperwork and allow the participant to move to the next service. If the participant's blood pressure remains elevated (130/80 mmHg or higher) during the second reading, a third reading must be taken. Allow the participant to sit quietly for 3-5 minutes and ask them to relax prior to taking the third reading. Take the third reading using a manual blood pressure cuff. Record the third reading, or the lowest of all three readings, on the participant's paperwork. If after three readings the participant's blood pressure remains elevated (130/80 mmHg or higher) refer the participant to follow up with their primary care provider.

### Emergency Blood Pressure Referral Protocol

Individuals with extremely low (less than 90/60 mmHg) or extremely high (greater than 180/120 mmHg) blood pressure readings should be monitored for symptoms and referred to a physician immediately. Call TotalWellness and speak with the Director of Nursing or Medical Director for assistance in accessing the situation. Call 911 if the participant is exhibiting extreme low/high blood pressure symptoms such as severe headache, confusion, dizziness, fatigue, vision problems, chest pain, difficulty breathing or an irregular heartbeat. Complete an incident report if 911 is called.

### Interpreting Results

Classification	Systolic (mmHg)		Diastolic (mmHg)
Normal	Less than 120	and	Less than 80
Elevated	120 - 129	and	Less than 80
Stage 1 Hypertension	130 - 139	or	80 - 89
Stage 2 Hypertension	140 or higher	or	90 or higher
Hypertensive Crisis*	Higher than 180	and/or	Higher than 120

\*Individuals in the Hypertensive Crisis category should be referred to a primary care provider/physician immediately.

### Important Tips

- In a health screening setting, blood pressures commonly read a bit higher than usual for a variety of reasons, including active environments, participants being unable to sit quietly for a few minutes prior to screening, and "white coat syndrome."
- If a participant questions his/her values offer to take his/her blood pressure again.
- Allow the participant to come back if they are unhappy with his/her result. Participants tend to feel calmer after completing the finger-stick or blood draw portion of the screening (if applicable).
- If a participant is aware that his/her blood pressure is elevated, and the participant is currently working with his/her primary care provider let the participant know that he/she is doing the right thing.
- Recommend that individuals with elevated blood pressure keep an eye on their values by checking their blood pressure frequently (most grocery stores offer free checks) and keeping a log.
- Remember to ask the participant if they have had their blood pressure taken before and if they remember the values. Individuals with high blood pressure will often remember their numbers. By having the known systolic you can be sure to inflate the blood pressure cuff to 30 mmHg over that number; therefore, reducing the amount of retakes due to not inflating the cuff enough.

# Appendix H

TotalWellness Finger-Stick Cholesterol & Glucose  
Clinical Screening Procedures

# Finger-Stick Cholesterol & Glucose Screening

## Clinical Procedure



### Supplies

- CardioChek® Plus Device
- CardioChek® Plus Lipid Test Strips & eGlu Test Strips
- Lancets
- Capillary Tubes
- Sharps Containers
- Biohazard Bags
- Gauze
- Alcohol Swabs
- Bandages (Band-Aids)
- Gloves
- Placemats
- Sanitizing Wipes
- Hand Sanitizer

### Definition & Purpose

**Cholesterol** – Soft, waxy, fat-like substance found throughout the body, including the bloodstream and cells. Excess cholesterol can form plaque between layers of artery walls, making it harder for blood to circulate. Reduced blood flow can lead to stroke or heart attack.

- **Cholesterol Readings**
  - Total Cholesterol (TC)– This value is not a type of cholesterol but instead a composite of different types. It is calculated by adding a participant's HDL and LDL level, plus 20% of their Triglyceride level.
  - High-density Lipoprotein (HDL) Cholesterol – HDL cholesterol is often referred to as the “good” cholesterol. HDL cholesterol removes harmful cholesterol from where it doesn't belong. High HDL levels reduce the risk for heart disease, but low levels increase the risk.
  - Low-density Lipoprotein (LDL) Cholesterol – LDL cholesterol is often called “bad” cholesterol because high levels lead to buildup in arteries, which narrows and may eventually block them. LDL cholesterol is the primary target of cholesterol-lowering therapy.
  - TC/HDL Ratio – This number illustrates how much of the participant's cholesterol is the “good” HDL cholesterol. A low level of LDL along with a high level of HDL reduces the participant's risk for heart disease, heart attack and stroke.

**Triglycerides** – A type of fat (lipid) found in blood. High triglycerides can raise heart disease risk.

**Glucose** – Main source of energy used by the body. Glucose levels that remain high over time can damage eyes, kidneys, nerves, heart and blood vessels.

### Fasting vs. Non-Fasting

TotalWellness considers an individual to be fasting if they have had no caloric intake for at least 9 hours. Water intake is acceptable and encouraged. Participants are encouraged to fast for their screening, but fasting is not required. Total Cholesterol, HDL Cholesterol, and TC/HDL Ratio are all accurate without fasting. Glucose is also accurate without fasting, but non-fasting and fasting glucose acceptable ranges vary depending on the fasting status. TotalWellness provides both non-fasting and fasting glucose range charts, which should be used accordingly. LDL cholesterol and Triglyceride readings are accurate if the participant has fasted. If the participant has not fasted LDL cholesterol and Triglyceride readings may not be accurate. Write down all values for the participant, and during the results review discuss how fasting can affect LDL Cholesterol and Triglycerides.

### Measurement

Always wear two gloves, one on each hand, when collecting blood samples. Wear new gloves for each participant and sanitize hands in between participants.

1. Prepare the machine.
  - a. Insert the MEMo Chip that matches the lot number on both the eGLU and the Lipid Panel test strip vials. Remove one eGLU test strip from test strip vial and immediately replace cap. Insert the eGLU test strip into the designated eGLU test port. Remove one Lipid Panel test strip from test strip vial and immediately replace cap. Insert the Lipid Panel test strip into the designated reflectance test strip port.
    - i. It is very important to immediately replace the cap on test strip vials as extended exposure to air can cause inaccurate results.
2. Ask the participant which hand and finger they would like to use. The sample should be collected from one of the center fingers.
  - a. TotalWellness does not require participants to use a specific finger.

3. Kindly remind the participant to face forward, both feet on the floor, and relax.
4. Choose a spot on the side of one of the center fingers. The fingers should be warm to the touch, if they are not:
  - a. Gently massage the finger from the base to the tip several times to bring the blood to the fingertip.
  - b. Ask the participant to run their hands under warm water.
5. Clean the site with an alcohol swab. Dry thoroughly with a gauze pad before pricking the finger.
6. Firmly prick the side of the fingertip with a lancet. Dispose of lancet in provided biohazard container.
7. Squeeze the entire finger gently to obtain a large drop of blood.
  - a. Gently touch the finger to the tip of the glucose test strip to apply 1.1 uL drop of blood. Do not place blood on top of the test strip. Do not press the glucose test strip into the finger. It is acceptable to move the machine to touch the finger as opposed to moving the finger to the machine. Blood will be drawn into the strip automatically by capillary action. After applying blood to the eGLU test strip, wipe the finger to remove any blood with a clean piece of gauze.
8. Squeeze the finger gently again while holding it downward until a second large drop of blood forms. Do not milk the finger. The puncture should provide a free-flowing drop of blood.
9. Hold the capillary tube horizontally or at a slightly descending angle. Without squeezing the bulb, gently touch the end of the capillary tube to the blood drop. The tube will fill by capillary action. Allow capillary tube to fill all the way to the black fill line. Do not collect air bubbles. If it is necessary to collect another drop of blood, wipe the finger with gauze then massage again from base to tip until a large drop of blood forms.
  - a. If you collect an air bubble and it does not go away after collecting the entire sample, dispose of the capillary tube in biohazard container and collect a new sample with a new capillary tube.
10. Fill the capillary tube within 10 seconds.
11. Wipe off any excess blood from the finger and have the patient apply pressure to the puncture until the bleeding stops. Apply a bandage (Band-Aid).
12. Apply the sample:
  - a. Place the sample into the test strip blood application window by squeezing the bulb to apply the sample to the test strip. Be careful not to touch the tip of the capillary tube onto the test strip. The test will start running automatically.
13. Dispose of capillary tube in biohazard container.
14. Obtain the results and dispose of the testing supplies.
  - a. Results will appear in the machine window in approximately 2 minutes. Record results on participant's paperwork.
    - i. In order to view all results, you will need to press the arrow button on the machine to scroll to the next screen of results.
    - ii. Remove test strips and dispose of in biohazard bag. Dispose of contaminated gloves in biohazard bag and uncontaminated gloves in regular trashcan.
15. Clean and disinfect the CardioChek Plus machine after each participant.
  - a. Clean the machine by wiping it down with a provided sanitizing wipe.
  - b. Disinfect the machine by utilizing a new sanitizing wipe and keeping the area wet for 2 minutes.
  - c. Allow the machine to air dry completely.
  - d. After disinfecting, carefully wipe the optical glass with an alcohol wipe and dry with gauze to remove any residue from the disinfectant.

### Interpreting Results

Category	Desirable	Borderline High	High Risk
<b>Total Cholesterol (TC)</b>	199 and below	200-239	240 and above

Category	Lowers Your Risk	Normal	High Risk
<b>HDL Cholesterol</b>	60 and above	40-59	39 and below

Category	Optimal	Near Optimal	Borderline High	High	Very High
<b>LDL Cholesterol</b>	99 and below	100-129	130-159	160-189	190 and above

Category	Optimal	Normal	High Risk
TC/HDL Ratio	3.5 and below	3.6-4.9	5.0 and above

Category	Normal	Borderline High	High
Triglycerides	149 and below	150-199	200 and above

Category	Normal	Pre-diabetes	Diabetes
Glucose	Fasting: 99 and below Non-Fasting: 139 and below	Fasting: 100-125 Non-Fasting: 140-199	Fasting: 126 and above Non-Fasting: 200 and above

### High and Low Glucose Referral Protocol

Individuals with glucose readings of 300-399 mg/dL should be asked about their glucose history and instructed to follow up with their primary care provider. Individuals with extremely low (50 mg/dL or lower) or very high (400 mg/dL or higher) glucose readings should be questioned about their glucose history and monitored for symptoms. Call TotalWellness and speak with the Director of Nursing or Medical Director for assistance in accessing the situation. If the individual is not exhibiting symptoms and is aware of the condition recommend they follow up with their primary care provider immediately. Call 911 if the participant is exhibiting extreme low/high glucose symptoms. Extremely low glucose symptoms include confusion, dizziness, headaches, irritability, racing pulse, sweating, and weakness. Extremely high glucose symptoms include confusion, lethargy, excessive thirst, frequent urination, weak pulse, and nausea. Complete an incident report if 911 is called.

### Important Tips

- Raise your hand to gain the lead's attention if you are having issues.
- If you do not get results after the first attempt, gather another sample and run the test again using a new set of test strips and a different machine.
  - Do not stick a participant more than twice trying to get results.
- If a participant seems to question their results or if the results seem off, re-test them.
  - Make sure the participant knows that you are retesting because you just want to double check. NOT because the machines are inaccurate.
  - Participants should walk away feeling they received valuable information. Make sure they don't walk away thinking their values are incorrect.
- Put a bandage (Band-Aid) on the participant's finger, don't make the participant put it on themselves.
- Anytime blood comes in contact with your placemat, replace the placemat with a new one.
- Store test strip package in a cool, dry place at room temperature of 68-86°F (20-30°C). Keep away from heat and sunlight.
- Out of date or expired strips cannot be used. Check the expiration date on the vial prior to use.
- Do not remove or discard the desiccant packet in the vial.
- Always replace vial cap immediately after removing a test strip.
- Insert test strips immediately before use. Do not insert in preparation of your next participant as this extended exposure to air could cause inaccurate results.
- Use test strip as soon as you have removed it from the vial.
- Keep the MEMo Chip either in the analyzer or stored with the original lot of test strips. Do not store the MEMo Chip in the test strip vial.
- Make sure the MEMo Chip and test strip lot numbers match. Never use a MEMo Chip from a different lot than the test strip.
- Add all of the blood to the test strip at once. If you do not get all of the blood on the test strip, do not add blood to the same test strip. Test again with a new, unused test strip and fresh blood sample.
- Test strips are to be read once. Never insert or read a used test strip.
- Ensure machine is not moved and table does not vibrate while sample is testing.
- The drugs dopamine and methyl dopa may cause decreased lipid results.
- Extremely high doses of ascorbic acid (Vitamin C) may cause decreased lipid results.
- Glycerol, which can be found in some hand creams and lotions, may cause inaccurate results.
- If you get an unexpected result, test again.



# Appendix I

TotalWellness Venipuncture Blood Draw Cholesterol &  
Glucose Clinical  
Screening Procedures

# Venipuncture Blood Draw

## Procedure



### Supplies

- Blood Draw Kits (contains pre-labeled tubes, barcode pad, gloves, alcohol swab, gauze pad, safety needle and Band-Aids)
- Butterfly Needles
- Supplemental Supply Packs
- Sharps Containers
- Biohazard Bags
- Tourniquets
- Placemats
- Centrifuge
- Hand Sanitizer

### Definition & Purpose

A wide variety of tests are offered through the TotalWellness venipuncture blood draw program. The specific tests ordered by the client will be listed on the event worksheet. Participants will receive their results online, along with an explanation of each test, within two weeks of the event. A text message will be sent to the participant when their results are ready.

### Measurement

#### SAMPLE COLLECTION

1. Open participant's lab kit.
2. Affix appropriate labeled barcode from barcode pad on applicable paperwork.
  - a. Consent Form – use barcode labeled consent form and place in upper right-hand corner.
    - i. If using iPad electronic data collection enter the barcode ID into the applicable field(s) on the iPad data entry screen.
  - b. Sign In Sheet – use barcode labeled Sign In Sheet and place in left hand column also write participants name on the Sign In Sheet.
3. Legibly write the participant's first and last name on each tube EXACTLY AS IT APPEARS ON THE PARTICIPANT CONSENT FORM. If the names do not match exactly, the specimen will be rejected.
4. Ask the participant which arm they would like to use or select the arm with the better vein for sample collection.
  - a. TotalWellness does not require samples to be collected in a specific arm.
5. Remind the participant to face forward, with both feet on the floor, and relax.
6. Complete blood draw using proper venipuncture techniques.
7. Your event worksheet, paper consent form, and/or iPad data entry screen will indicate which tubes are required. You may have to collect both a Serum Separator (Tiger Top) and Lavender Top Tube depending on the tests ordered.
  - a. On the consent form an (S) next to a test indicates that the sample should be collected in the Serum Separator (Tiger Top) Tube, spun down, and poured off into a red top tube. An (L) next to a test indicates that the sample should be collected in the Lavender Top Tube.
  - b. On the iPad data collection screen, a 02 indicates that the sample should be collected in the Serum Separator (Tiger Top) Tube, spun down, and poured off into a red top tube. A 03 indicates that the sample should be collected in the Lavender Top Tube.
8. Collect the tubes in the following order.
  - a. Serum Separator (Tiger Top) Tube
  - b. Lavender Top Tube
9. If a new tube or second attempt is needed DO NOT open a new kit, use components from the supplemental supplies. Use extra barcodes from participant's lab kit for new tube. Tubes with multiple barcodes will be rejected.
10. Only two attempts are to be made on a difficult stick. If another contractor is onsite have them draw the sample if you were unable to collect it on the first try. Even if the participant insists on a third attempt, DO NOT attempt per TotalWellness policy.
11. Document your collection results on the Sign In Sheet.
12. Complete and sign/initial the examiner information section acknowledging the screening was completed according to these procedures and that all tubes and paperwork are properly labeled.
  - a. Tubes not properly labeled with name and barcode (missing or multiple barcodes) will be rejected.

- b. Record time participant was seen (on paper consent form) and record any comments regarding participant's screening in the COMMENTS section (i.e. Attempted two times – unsuccessful, participant refused draw, hard stick, measurements only, etc.)
13. Have the participant verify all tubes and paperwork (consent form or iPad data and sign in sheet) are complete and properly labeled with matching barcodes and names. Ask the participant to initial the consent form or check the iPad box acknowledging tubes and paperwork are properly labeled and their measurements are accepted, as applicable. This MUST be done after the measurements and blood collections are completed, NOT before.
14. Before dismissing participant, secure all forms (Personal Health Information should never be visible to other participants) and discard any remaining barcodes.

### **Measurement Continued**

#### **SAMPLE PROCESSING**

1. Mix Lavender Top Tube by inverting tube 10 – 20 times. DO NOT centrifuge.
2. Allow the sample in the serum separator (Tiger Top) tube to clot, but do not let the samples sit longer than 45 minutes. Centrifuge the serum separator tube for 15 minutes at high speed. This process should be done onsite while the screening is going on. Ensure centrifuge is balanced and stable while spinning samples.
3. Pour off serum from Serum Separator (Tiger Top) Tube into properly labeled/barcoded Pour-Off (Red Top) Tube.
4. Double check barcodes before and after you pour.
5. Discard the Serum Separator (Tiger Top) Tube in appropriate biohazard container.
6. Place cap securely on Serum Pour-Off (Red Top) Tube.
7. Check to make sure the cap is flush with the tube to avoid leaking during shipment.

#### **PACKAGING/SHIPPING**

1. Tube Holder – Construct tray (flat brown cardboard) by pulling sides apart. Press down the bottom center to secure tray. Expand honeycomb and insert into tray.
2. Place specimens in tube holder (up to 48 tubes). (Red Top Tubes and/or Lavender Top Tubes)
3. Place tube holder and an absorbent (dry lock) in plastic zip lock bag. Close bag securely.
4. Construct outer box (flat white cardboard) by pushing sides together to form a square box. Press down the bottom center to secure box.
5. Slide the bagged tube holder into outer box. Secure box by folding the flaps and inserting the tab (remove excess at perforations).
6. If paper consent forms were used, place consent forms in manila envelope labeled Confidential Documents.
7. Place the samples and consent forms (if applicable) into the lab pack and securely seal closed.
8. Affix overnight shipping label to outside of lab pack. Ship package from a staffed FedEx facility.
9. Record the tracking numbers, content of packages and shipping information on the Clinical Reference Lab (CRL) Wellness Sample Tracking Form.
10. Upload Sign In Sheet(s) and CRL Wellness Sample Tracking Form with your event summary.
11. Return original Sign In Sheet(s) and CRL Wellness Sample Tracking Form to TotalWellness with your return supply shipment.

### **Important Tips**

- Raise your hand to gain the lead's attention if you are having issues.
- If you do not get a sample after the first attempt, you can attempt a second stick. Do not stick a participant more than twice trying to get a sample.
- Butterfly needles are available for tough sticks, but they should not be used for every participant.
- If optional tests are available, be sure to check the test on the consent form for participants wanting the test.
- Anytime blood comes in contact with your placemat, replace the placemat.

# Appendix J

## TotalWellness Results Review Procedure

# Results Review

## Procedure



### Supplies

- Participant Handout (Hand out)
- Participant Consent Form (Keep)

### Calling up Participants

When screenings are provided in a station-to-station model, you may need to call up participants to results review after their finger-stick blood work is complete. When calling participants, announce the individual's first name and have the individual provide you with their last name and date of birth. It is important to verify at least three participant identifiers (first name, last name, date of birth, and/or unique ID) prior to sharing values with the participant. Ensure the participant is not provided with any values (verbal or written) until their identity has been verified.

### Definition & Purpose

Results review is designed to provide the participants with an overview of their results and what their results mean. Results review is intended to be brief, positive and informative for the participant.

### Implementation

#### Welcome

1. Welcome the participant and introduce yourself.
2. Explain that you will be "explaining the meaning of the participant's numbers today."
3. Ensure both the handout and consent form/iPad include all of the participant's values.

#### Review Results

1. Use the handout or onsite data collection results review screen to guide the participant through each result.
  - a. Make sure to point to the results, never voice values out loud and avoid visible, verbal or nonverbal cues as to what health data you might be discussing.
2. Explain what each reading is and if the participant is doing well or needs work.

#### Next Steps

1. Make sure the participant knows exactly what to do next.
  - a. Complete the satisfaction survey – either online using the iPad or via a paper survey.
  - b. Complete their health assessment, if applicable and utilize other available client programs.

#### Question

1. Close the conversation by asking if the participant has any questions.
  - a. Is there anything else I can go over?
  - b. Do you have any questions for me before you go?

#### Paperwork

1. Participant should leave with their handout and any client specific paperwork.
2. Keep the TotalWellness consent form. Be sure to store upside down.

### Important Points

**Duration** – Results review should be limited to 3-5 minutes of conversation. If you are providing services in a pod setting, be sure the entire screening duration, including results review, is between 10-15 minutes long.

**Screening vs. Diagnosing** - TotalWellness services are for screening and education purposes only. We never diagnose at a screening. If an individual has elevated or at-risk values, they should always be referred to their primary care provider for follow-up.

**Body Mass Index (BMI)** - When discussing BMI avoid using the words overweight or obese. Instead, utilize the language "at higher risk" or "at a lower risk". Point to the categories on the handout and indicated where the participant currently is and where the participant should aim to be. Keep in mind that BMI is not always a reliable measure of health. BMI may overestimate body fat in athletes and others who have a muscular build. BMI may underestimate body fat in older persons and others who have lost muscle mass.

**Waist Circumference** - When talking about waist circumference remember to incorporate BMI. Individuals who carry weight in their abdomen are at higher risk of health conditions than individuals who carry weight in their hips. If an individual has a BMI in the overweight category, but has a waist circumference in the normal category, their risk for health conditions will likely be lower because they aren't carrying their weight in their abdomen.

**Blood Pressure** - Blood pressure fluctuates and tends to be higher in a health screening setting. Stress, anxiety, temperature, caffeine, alcohol, and nicotine can all affect an individual's blood pressure. It is important to ensure the participant feels that he/she received an accurate reading. If an individual is unhappy with their blood pressure results, offer to test the participant's blood pressure again. If the participant has a blood pressure of 130/80 mmHg or higher make sure you recommend that they follow up with their primary care provider to evaluate their blood pressure.

**Cholesterol & Triglycerides** - When discussing cholesterol, it is important to look at whether the individual fasted. Total cholesterol (TC), HDL cholesterol, and TC/HDL ratio are all accurate without fasting. LDL and triglycerides may be inaccurate if the individual is non-fasting. If an individual has fasted, LDL and triglycerides can be discussed as normal. If the individual has not fasted, still review the LDL and triglyceride values but be sure to indicate that the results may not be accurate because the individual did not fast. Generally, if the values are in the normal range, you can say that even though the individual did not fast their values look good. If the individual has elevated values, disclose that the values may be inaccurate because the individual did not fast, and the participant should not utilize the values provided.

**Glucose** - When reviewing glucose results with the participant, be sure to look at the participant's fasting status and use the appropriate results chart, either fasting or non-fasting. Results for glucose are accurate if the participant did or did not fast, but the results ranges vary according to fasting status. Elevated glucose values can be an indicator for diabetes. Encourage participants who know they have diabetes to manage their diabetes according to their doctor's recommendations and continue to see their doctor regularly.

**Finger-Stick vs. Venipuncture Blood Draw** - Participants often question if finger-sticks are as accurate as blood draws. The answer is yes, both finger-stick and venipuncture blood draw samples are required to meet certain criteria for the analyzers to be approved. All analyzers utilized by TotalWellness meet the set criteria. One of the main differences between the two is that finger-stick tests are used for screening only, while venipuncture blood draw samples are utilized for diagnostic purposes. TotalWellness generally encourages finger-stick tests because they provide instant results and an opportunity for a teachable moment with the participant.

**Weight Management** - Weight management can be a difficult topic to discuss with participants. It is important to address the participant's chief concern first, independent of weight. You can assume that most participants already know that they are not at their optimal weight. Generally, participants do not want health care professionals to place blame or attribute all of their health problems to weight. We recommend that you encourage healthy behaviors such as eating healthy and increasing physical activity, but don't specifically recommend weight loss or weight gain.

**Healthy Eating** - Nearly all the values assessed can be improved with healthy eating habits. Be sure to keep recommendations generic. Recommend increasing fruit, vegetable, and whole grain consumption and decreasing foods high in fat, salt, and sugar. Give participants tips about choosing low-fat or non-fat dairy products over full fat versions. Encourage moderation.

- DO NOT encourage participants to eat a specific food or avoid a specific food, be general.
- DO NOT recommend vitamin supplements or diet plans.

**Physical Activity** - Physical activity is also a great way to improve values. National recommendations are to get at least 30 minutes of exercise per day, most days of the week. Encourage participants to start with something easy like walking. Also encourage participants to make exercise fun. They can do anything that interests them, gardening, dancing, yoga, etc.

- DO NOT recommend a specific type of physical activity. Make sure you provide general examples, not specific recommendations.