

Screening Clinical Procedures



For your Reference...

All screening clinical procedures are based on established industry and medical standards from organizations such as the Centers for Disease Control and Prevention, American Heart Association, PTS Diagnostics, Clinical Reference Laboratory, and other credible medical organizations.

TotalWellness has compiled these standards into this resource to support independent contractors in delivering consistent, high-quality screening services across all client sites.

As a contracted healthcare professional, you are expected to use your clinical judgment while following these established procedures to ensure a safe, accurate, and professional experience for each participant.

This document outlines best practices and clinical procedures for the following services:

| | |
|--|----|
| Participant Experience | 3 |
| Station Setup | 6 |
| Registration | 10 |
| BMI, Height, Weight, and Waist Circumference | 13 |
| Blood Pressure | 17 |
| CardioChek Finger-Stick Test | 22 |
| Venipuncture Blood Draw | 31 |
| Results Review | 41 |

Participant Experience

Participant Experience



Procedure

As a contracted healthcare professional, you are responsible for creating a welcoming, supportive, and informative experience for each participant. Clients expect participants to feel comfortable, respected, and confident in the services provided throughout the screening process.

Within the wellness industry, we achieve this through four major components.

1 Welcome

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

2 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 middle fingers) they would like to use for finger-stick services.

3 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.
- If a participant seems apprehensive or nervous about receiving a service, give them time to relax and regroup prior to providing the service.

4 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, most medical professionals prefer to complete the finger-stick blood test first, so other services can be provided while the sample is processing.

Electronic Onsite Data Collection

When a client is utilizing electronic onsite data collection with iPads, 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 an electronic or paper participant satisfaction survey. Clients expect you to provide the participant with privacy to complete the survey by stepping away from your station. Participants are not required to complete the survey, but clients do require that you offer them the option to complete it.

Station Setup

Pod & Station Setup

Procedure

Pod or Station-to-Station Setup

Your event worksheet will indicate if the client requested services to be delivered in a pod format (all services at one station) or a station-to-station format (one service per station). Use this information to plan your setup accordingly.

Equipment Setup

As a contracted healthcare professional, you will use your judgment to set up equipment in a way that supports accuracy, safety, and participant privacy. However, manufacturer and wellness industry standards have found that the following recommendations work best for equipment set up.

Stadiometer – Set up against a wall.

Scale – Set up 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.

Privacy Screens – Set up to create a “U” shape, making the station as private as possible. Privacy screens are provided for pods, height/weight/waist, and health education stations.

Centrifuge – Set up in a centralized location, on a hard, level surface.

Tables & Chairs – Set up chairs to face each other without a table in between. Up to two stations can be arranged per table, positioned at opposite ends for blood pressure, finger-stick, and venipuncture setups.

Boxes & Cases – Store out of site, either under tables or generally hidden.

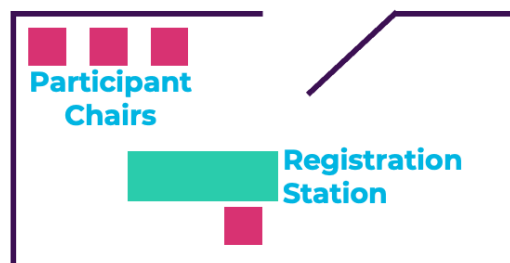
Station Setup

Set up stations using the materials listed.

Registration Station

- 1 Table
- 1 Chair
- 1 iPad
- Pens
- Privacy Practices Notice
- Paper Consent Forms
- Participant Roster

Set up at the room entrance and keep names on the participant roster hidden. If extra chairs are available, setup a participant waiting area near registration.



Pod Station

Equip each pod station with the following:

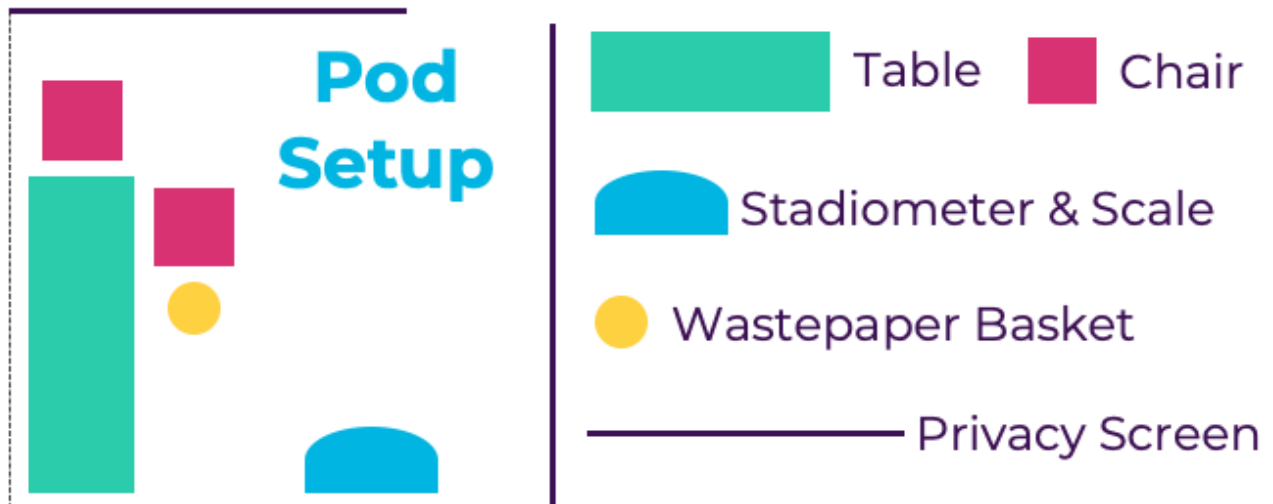
- 1 Table
- 2 Chairs
- 2 Privacy Screens
- 1 Wastepaper Basket
- 1 iPad
- Participant Handouts
- 1 Stadiometer
- 1 Scale
- 1 Clipboard
- 1 BMI Chart
- 1 Flexible Tape Measure
- 1 Adult BP Cuff
- 1 Adult Large BP Cuff
- 1 Stethoscope
- Placemats
- Sanitizing Wipes
- Hand Sanitizer
- Sharps Container
- Biohazard Bag

Add the following for **Finger-Stick** Pods

- 1 CardioChek® Plus Analyzer
- Lipid & eGlu Test Strips
- Gloves
- Alcohol Wipes
- Gauze
- Lancets
- Capillary Tubes
- Band-aids
- Placemats

Add the following for **Venipuncture** Pods

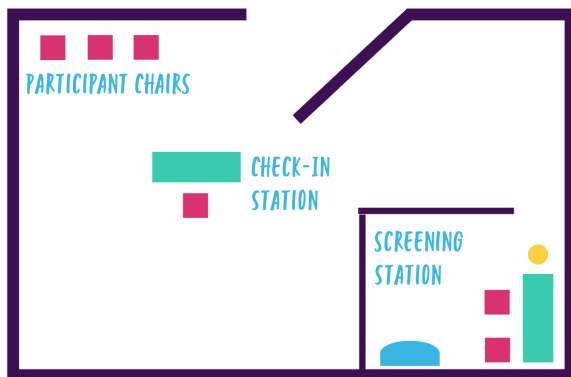
- Blood Draw Kits
- Butterfly needles
- Tourniquet
- Supplemental Supply Packs
- Centrifuge (shared)



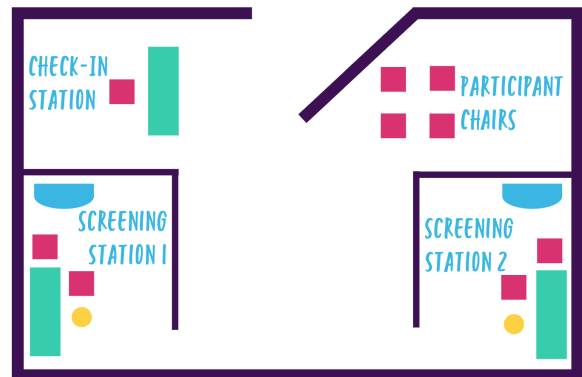
Room Layout

Use your best judgement and previous experience to establish the room layout. Generally, it works well to setup the room with registration upon entry or just outside of the entrance. Setup screening stations along outside walls for added privacy. Ensure the room is setup to flow nicely for the participant experience.

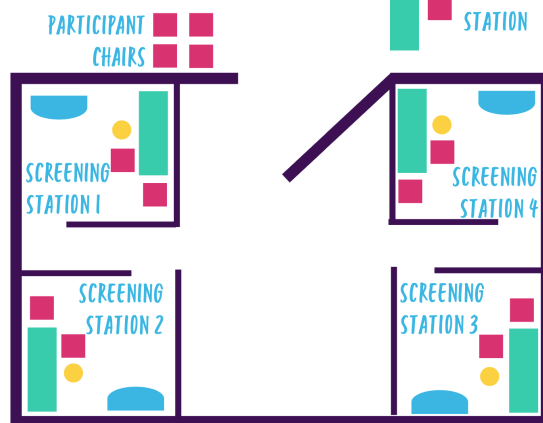
ONE STATION



TWO STATIONS



FOUR STATIONS



SYMBOL KEY

 Table  Chair  Stadiometer & Scale  Privacy Screen  Wastepaper Basket

Station Modifications

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

- Registration may be completed within a pod when appropriate, such as during lower-volume events, limited staffing, or when iPads are not available for a separate registration station.
- 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.

Registration

Registration

Procedure



Supplies

- 1 Table
- 1 Chair
- 1 iPad
- Pens
- Privacy Practices Notice
- Paper Consent Forms
- Participant Roster

Definition & Purpose

As a contracted healthcare professional, you play a key role in delivering a smooth and organized registration experience by welcoming, checking in, and guiding participants through each step.



Implementation

Welcome

- Welcome the participant and thank them for coming.
- Check participant in on the roster.
 - If the participant didn't pre-register, add their name to the roster, if they can be accommodated.

Consent Form

- iPad (Electronic Data Collection) Events
 - Look up participant in the iPad using date of birth.
 - Verify at least three data points - first name, last name, date of birth and/or unique ID.
 - Locate the correct participant and click "Enter Readings."
 - Pass the iPad to the participant so they can read through the consent language, answer the screening questions, and sign the form.
- Paper Consent Events
 - Provide participant with paper consent form and offer instructions on how to complete.
 - You can fill in the event ID and date in advance.
 - Unique ID can be left blank if unknown.

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.

Flu Shot Events

At flu shot events with paper consent forms, you can document the vaccine brand and lot number on the form if the same lot is being used for the entire event. Also, remind participants to roll up long sleeves.

Contractor Success Tips

- **Participant Questions:** If a participant has a question about their specific program and you are unsure of the answer, you may direct them to their HR representative or the TotalWellness Primary Contractor for guidance.
- **Appointment Flow:** Prioritize scheduled appointments, and accommodate walk-ins as time allows.
- **Managing Wait Times:** If walk-ins begin to create delays, you may invite them to return closer to the end of the event to help maintain a smooth flow.
- **Fasting Reminder:** Fasting generally means not eating or drinking anything (except water) for at least nine hours prior to the screening.
- **Event Support:** Assist with general crowd flow as needed to help create an organized and positive experience for all participants.

BMI, Height, Weight, and Waist Circumference

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

Clinical Screening Procedure

As a contractor, you play an important role in delivering accurate and professional screenings. Use your clinical judgment to obtain precise measurements, ensure participant comfort and privacy, and document results appropriately.

Supplies

- 1 Chair
- 1 iPad
- 2 Privacy Screens
- 1 Stadiometer
- 1 Scale
- 1 Clipboard
- 1 BMI Chart
- 1 Flexible Tape Measure
- Sanitizing Wipes
- Hand Sanitizer

Definition & Purpose

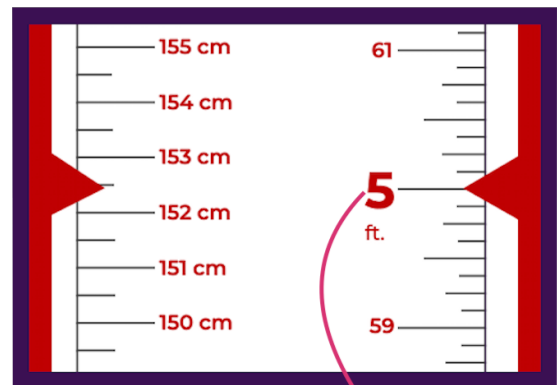
Body Mass Index (BMI) – Number calculated from a person’s height and weight. It is used to identify potential health risks due to being overweight or underweight.

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

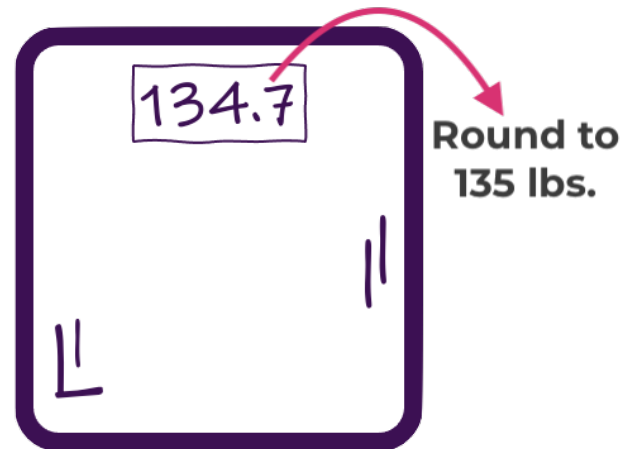
- Ask the participant to sit down and remove shoes and hats.
 - If the participant is uncomfortable removing their shoes, allow them to keep their shoes on.
- Have the participant stand straight with their back against the stadiometer post.
- Move the stadiometer platform until it touches participant’s head.
 - Ensure the platform is touching the top of the head and not just the top of the participant’s hair.
- Read the stadiometer where the red arrows point.
- Record reading.
 - Round to the nearest inch.
 - Round down at .4 inches and under.
 - Round up at .5 inches and over.



- Record results in feet and inches, meaning 5 feet 6 inches.
 - You may need to convert total inches to feet and inches (remember there are 12 inches in 1 foot).

Weight

- Ask participant to remove shoes, hats, and anything heavy out of pockets.
- Turn on the scale by tapping scale until the display shows 00.0.
- Ask participant to stand on scale.
- Record reading.
 - Round to the nearest pound.
 - Round down at .4 lbs. and under.
 - Round up at .5 lbs. and over.



BMI

- The participant's BMI will automatically calculate when using the iPad.
- For paper consent forms:
 - 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

- Ask the participant to hold the tape measure end (0 inches) at their belly button.
 - Place on the lowest layer of clothing.
 - Remember to use the zero end of the tape measure and the side that reads inches.
- Instruct the participant to spin in a circle, so the tape measure wraps around them.
- Ensure that the tape measure is snug but does not push tightly into the skin.
- Measure waist circumference as the 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.

Interpreting Results

Use the following classifications:

Body Mass Index (BMI)

| Underweight | Normal | Overweight | Obese |
|-------------|-------------|------------|-------|
| < 18.5 | 18.5 – 24.9 | 25 – 29.9 | 30 + |

Waist Circumference

| Men | | Women | |
|-------------------|---------------------|-------------------|---------------------|
| Normal | Increased Risk | Normal | Increased Risk |
| 40 inches or less | 40.1 inches or more | 35 inches or less | 35.1 inches or more |

Pregnant Woman

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 as these readings will be inaccurate.

Contractor Success Tips

These tips are designed to support accurate measurements and a positive participant experience.

- **Measurement Variability:** Height measurements may differ slightly from prior readings, especially if earlier measurements were taken with shoes. A difference of 0.5 to 1 inch is common.
- **Accuracy Check:** If a participant questions their result, you may recheck the measurement. Position this as a standard double-check to support accuracy.
- **BMI Context:** BMI is a screening tool and may not fully reflect overall health, as it does not account for factors such as muscle or bone mass.
- **Waist Measurement Technique:** Measure waist circumference at the level of the belly button rather than the hips to support a consistent and accurate reading.
- **Clarifying Expectations:** Waist circumference is not the same as pant size and should be measured using a tape measure for accuracy.

Blood Pressure

Blood Pressure Screening



Clinical Procedure

As an independent contractor, you play a vital role in delivering accurate measurements, professional documentation, and appropriate follow-up care for participants. The following standards are provided to assist you in utilizing your clinical judgment to ensure a safe and professional screening environment.

Supplies

- 1 Table
- 2 Chairs
- 1 iPad
- 1 Adult BP Cuff
- 1 Large Adult BP Cuff
- 1 Stethoscope
- 1 Hand Sanitizer

Definition & Purpose

Blood pressure is the force of blood pushing against artery walls. It is expressed by two numbers:

Systolic Blood Pressure - The top number, which measures the pressure blood is exerting against artery walls when the heart beats.

Diastolic Blood Pressure - The bottom number, which measures the pressure blood is exerting against artery walls while the heart is resting between beats.

Maintaining healthy blood pressure helps reduce the risk for heart disease, stroke, and kidney failure.

Measurement

Participant Positioning

For the most reliable data, verify that the participant is:

- Seated comfortably with feet flat on the floor.
- Positioned so their arm is supported at heart level.

Cuff Selection & Placement

- **Sizing:** Use professional judgment to select a cuff where the bladder encircles at least 80% of the arm.
- **Alignment:** Ensure the index arrow falls within the indicated range.
- **Placement:** The cuff should be wrapped approximately one inch above the elbow crease, aligning the arrow with the brachial artery on the participant's preferred arm.

Locate the Artery

- Palpate the arm to locate the brachial artery
- Place the stethoscope bell lightly over the artery

Inflation & Deflation

- Close the valve and inflate the cuff to 180–200 mmHg, or 30 mmHg above the participant's known systolic pressure (if available)
- Each line on the gauge represents 2 mmHg
- Slowly release air at a rate of 2–3 mmHg/sec (about one mark per second)
- Listen with the stethoscope while observing the gauge

Systolic Reading

- When watching the sphygmomanometer, note the reading at the point when the pulse sounds (Korotkoff sounds) first appear.
 - o The sound should be a clear tapping noise.
 - o Listen for at least two beats to eliminate recording a single erroneous sound.
 - o Note the reading at the point when the first pulse sound appears, not the second beat.
 - o 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.

Diastolic 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.
 - o 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.

Document Results

- Write results on the 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 the initial reading is **130/80 mmHg or higher** (either value), take additional readings (up to three total).

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.

Third Reading - 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. Always 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 or extremely high blood pressure readings should be monitored for symptoms and referred to a physician immediately.

Extremely Low BP – Less than 90/60 mmHg

Extremely High BP – Greater than 180/120 mmHg

Call TotalWellness and speak with the Director of Nursing or Medical Director for assistance in assessing 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

Use the following classifications:

| 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.

Contractor Success Tips

These tips are designed to support accurate measurements and a positive participant experience.

- **Environmental Factors:** Recognize that “white coat syndrome,” time constraints, or an active screening environment may slightly elevate readings.
- **Participant Comfort:** If a participant expresses concern, offer to recheck their blood pressure or invite them to return after completing other portions of the screening, when they may feel more at ease.
- **Supportive Approach:** When participants share that they are already managing elevated blood pressure with a primary care provider, a brief acknowledgment can help reinforce their ongoing care.
- **Ongoing Awareness:** For participants with elevated readings, suggesting regular monitoring and keeping a simple log of values can be a helpful next step. Many community locations, such as grocery stores or pharmacies, offer convenient blood pressure stations.
- **Measurement Insight:** Ask if the participant is familiar with their typical blood pressure values. This can help guide cuff inflation (generally about 30 mmHg above their usual systolic) and support an accurate reading.

CardioChek Finger-Stick Test

Finger-Stick Cholesterol & Glucose Screening

CardioChek® Plus Clinical Procedure

This procedure is intended to guide independent contractors in delivering accurate, safe, and professional finger-stick screenings. While these standards provide a framework, contractors are expected to apply clinical judgment based on each participant's needs.

Supplies

- 1 Table
- 2 Chairs
- 1 Wastepaper Basket
- 1 iPad
- Participant Handouts
- 1 CardioChek® Plus Analyzer
- Lipid & eGlu Test Strips
- Gloves
- Alcohol Wipes
- Gauze
- Lancets
- Capillary Tubes
- Band-aids
- Placemats
- Sanitizing Wipes
- Hand Sanitizer
- Sharps Container
- Biohazard Bag

Definition & Purpose

Participants are provided with their results within minutes of testing.

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.

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

An individual is considered to be fasting if they have had no caloric intake for at least nine hours. Water intake is acceptable and encouraged.

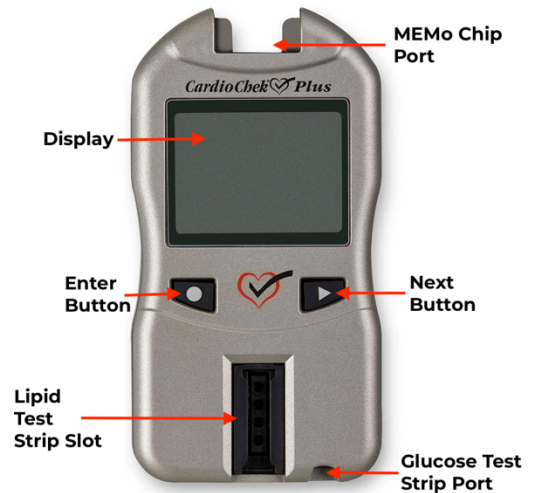
Participants are encouraged to fast for their screening, but fasting is not required. Total Cholesterol, HDL Cholesterol, and TC/HDL Ratio are all accurate without fasting. Glucose is also accurate without fasting, but non-fasting and fasting glucose acceptable ranges vary depending on the fasting status.

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.

Equipment

CardioChek® Plus Analyzer

The CardioChek Plus analyzer will provide cholesterol, triglycerides, and glucose results for participants. It is battery powered and provides results in 2-4 minutes.



Optics Check

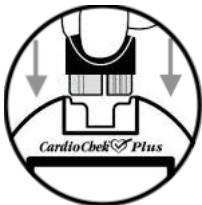
At the start of each event, run an optics check on each machine using the grey Check Strip. Document the results on the pre-screening checklist.

1. Press the Enter or Next button to turn on the machine.
2. Press Next button until CHECK STRIP is highlighted. Press Enter.
3. Hold the grey check strip at the base and insert the check strip, ribbed side up, into the Lipid Test Strip Slot when INSERT STRIP is displayed.
4. The analyzer should display PASSED, which means the machine is ready for use.
 - a. If the display reads FAILED, put the machine aside and do not use.
5. Remove grey check strip and press either button to return to the main menu.



The MEMo Chip

Each package of PTS Panels test strips contains a color-coded, lot-specific MEMo Chip.



The MEMo Chip lot number must match the lot number on your testing strips. Insert the MEMo Chip into the port at the top of the analyzer with the finger notch facing up (with the lot code number facing down).

Test Strips

Each testing bundle will include a lipid test strip and a glucose test strip. The lipid test strip goes into the lipid test strip slot and the glucose test strip goes into the glucose test strip port.

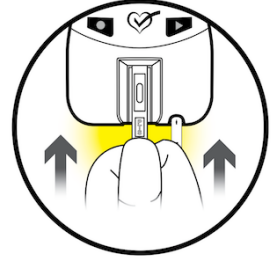
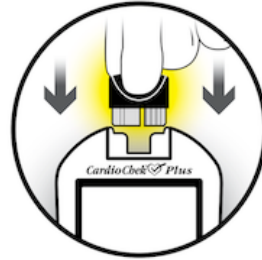
Ensure test strips are inserted with the correct side up, as pictured on the right.



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.

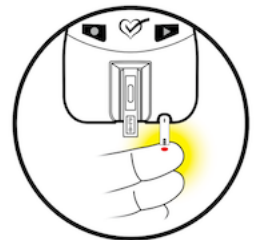
1. Prepare the machine.
 - a. Insert the MEMo Chip.
 - b. Insert the glucose (eGLU) test strip into the glucose test strip port and lipid test strip into the lipid test strip slot.
 - c. Immediately cap test strip containers.
 - i. It is very important to immediately replace the cap on test strip vials as extended exposure to air can cause inaccurate results.



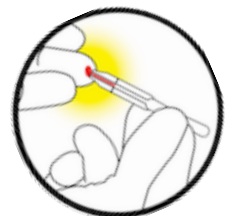
2. Stick participant's finger.
 - a. Utilize one of the participant's middle fingers.
 - b. Clean the site with an alcohol swab and dry with gauze pad.
 - c. Massage the hand from palm to fingertip to get a "flush" at the end of the finger.
 - d. Firmly prick the side of the fingertip with a lancet where you see the flush.
 - e. Dispose of lancet in provided biohazard container.



3. 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.
 - i. Do not place blood on top of the test strip.
 - ii. Do not press the glucose test strip into the finger.
 - iii. It is acceptable to move the machine to touch the finger as opposed to moving the finger to the machine.
 - b. After applying blood to the eGLU test strip, wipe the finger to remove any blood with a clean piece of gauze.



4. Collect sample.
 - a. Squeeze the finger to obtain a second large drop of blood.
 - i. Hold the hand downward.
 - ii. Do not milk the finger. The puncture should provide a free-flowing drop of blood.
 - b. Hold the capillary tube horizontally or at a slightly descending angle.
 - c. Gently touch the end of the capillary tube to the drop of blood.
 - i. DO NOT squeeze the bulb.
 - d. Allow capillary tube to fill all the way to the black fill line.
 - i. 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.
 - ii. If you collect an air bubble and it does not go away after collecting the entire sample, dispose of the capillary tube in a biohazard container and collect a new sample with a new capillary tube.



- iii. Fill capillary tube within 10 seconds.
- e. After sample collection, wipe off excess blood, use gauze to apply pressure, and apply a bandage while the test is running.

5. Apply the sample:

- a. Place the sample onto the test strip blood application window by squeezing the bulb to apply the sample to the test strip.
- b. Be careful not to touch the tip of the capillary tube onto the test strip.
- c. The test will start running automatically.
- d. Dispose of capillary tube in a biohazard container.



6. Obtain the results and dispose of the testing supplies.

- a. Results will appear within the machine window in approximately two minutes.
 - i. Record results on participant's handout.
 - ii. Record results within the iPad or on the paper consent form.
 - iii. Press the arrow button on the machine to scroll to the next screen of results.
 - iv. Remove test strips and dispose of in a biohazard bag.



7. Clean and disinfect the CardioChek® Plus machine after each participant.

- a. Wipe machine down with sanitizing wipe to clean it.
- b. Utilize a new sanitizing wipe and keep the machine covered for two minutes to disinfect.
- 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

Total Cholesterol

| | | |
|---------------|-----------------|---------------|
| Desirable | Borderline High | High Risk |
| 199 and below | 200-239 | 240 and above |

HDL Cholesterol

| | | |
|------------------|--------|--------------|
| Lowers Your Risk | Normal | High Risk |
| 60 and above | 40-59 | 39 and below |

LDL Cholesterol

| | | | | |
|--------------|--------------|-----------------|---------|---------------|
| Optimal | Near Optimal | Borderline High | High | Very High |
| 99 and below | 100-129 | 130-159 | 160-189 | 190 and above |

TC/HDL Ratio

| | | |
|---------------|---------|---------------|
| Optimal | Normal | High Risk |
| 3.5 and below | 3.6-4.9 | 5.0 and above |

Triglycerides

| | | |
|---------------|-----------------|---------------|
| Normal | Borderline High | High |
| 149 and below | 150-199 | 200 and above |

Glucose

| | | |
|---|--|--|
| Normal | Pre-diabetes | Diabetes |
| 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

As a wellness industry standard, take action on individuals with low or high glucose readings

High Glucose | 300-399 mg/dL

- Ask participant about their glucose history.
- Instruct the participant to follow up with their primary care provider.

Extremely Low | 50 mg/dL or lower

- Question the participant about their glucose history.
- Monitor for symptoms such as confusion, dizziness, headaches, irritability, racing pulse, sweating, and weakness.

Extremely High | 400 mg/dL or higher

- Question the participant about their glucose history.
- Monitor for symptoms such as confusion, lethargy, excessive thirst, frequent urination, weak pulse, and nausea.

Call TotalWellness and speak with the Director of Nursing or Medical Director for assistance in assessing the situation. If the individual is not exhibiting symptoms and is aware of the condition recommend, they follow up with their primary care provider as soon as possible.

Call 911 if the participant is exhibiting extreme low/high glucose symptoms. Complete an incident report if 911 is called.

CardioCheck® Plus Tips

Difficulty Collecting a Blood Sample

- Make sure the hand and finger are warm to the touch.
- Increase blood flow by squeezing and massaging the hand and finger.
- Ensure the hand is below the participant's heart.
- Clean the site with alcohol and gauze to reengage blood flow.
- If the blood runs down the finger, hold the finger with the puncture down so the blood drop "hangs".
- Ensure the capillary tube is horizontal, at a slight decline.
- Touch the capillary tube to the blood droplet only, do not touch the finger with the capillary tube.

Re-Testing

- 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.
 - If feasible, have the primary contractor complete all re-tests.
 - 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 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.

Test Strip Integrity

- 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.
- Test strips are to be read once. Never insert or reuse a used test strip.
- Ensure test strips are inserted correctly into the machine.

Applying Samples

- Add all 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.

Analyzer Care

- The analyzer will not work if it is too hot or too cold. Keep it at room temperature.
- Ensure machine is not moved and table does not vibrate while sample is testing.
- The analyzer uses 4 AA batteries. If an analyzer seems to be “acting up” try replacing the batteries.

Test Limitations

- The drugs dopamine and methyldopa 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.

Test Timing

- Apply blood samples to slides within 60 seconds of the slide being inserted in the machine.
 - It is very important to work quickly. If the slide sits too long, it may provide inaccurate or no results.

Troubleshooting

Contact TotalWellness at 888.434.4358 if you are running into trouble with your CardioChek® Plus machines. We'll assist with troubleshooting. Popular troubleshooting topics are below.

Failed Optics Check

If your optics check fails try cleaning the lipid test strip slot with alcohol, drying with gauze, and rerunning the optics check. Ensure your optics check strip isn't damaged. If it is, try using a different check strip.

MEMo Chip Error

Use another MEMo chip, with the same lot number, from another box of strips.

Expired Lot

If the test strips are not actually expired, you most likely need to change the date on the machine. From the main menu click next until SETTINGS is highlighted. Press Enter. Press Next until SET TIME AND DATE is displayed. Correct the date and/or time. Press Next to display the EXIT screen, then press Enter to return to the Main Menu.

Incorrect Language

Turn off the analyzer. Press and hold the Enter button for approximately 5 seconds during the power-up state until LANGUAGE is displayed. Select English and press Enter to set the language.

Test Errors

When experiencing errors, it is important to determine the root cause of the issues. It may be the machine, the test strips, the collection method, or simply the participant's blood makeup. When issues start to arise, we recommend utilizing all new materials and adding back in one variable at a time.

Analyzer Errors

If an analyzer is not working after attempting to troubleshoot, mark the analyzer as broken and return to TotalWellness in your next return shipment.

Venipuncture Blood Draw

Venipuncture Blood Draw

Clinical Reference Laboratory (CRL) Clinical Procedure

Supplies

- 1 Table
- 2 Chairs
- 1 Wastepaper Basket
- 1 iPad
- Participant Handouts
- Blood Draw Kits
- Butterfly needles
- Tourniquet
- Supplemental Supply Packs
- Placemats
- Sanitizing Wipes
- Hand Sanitizer
- Sharps Container
- Biohazard Bag
- Centrifuge (shared)

Definition & Purpose

As a contracted healthcare professional, you are expected to use your clinical judgment to safely and accurately collect blood samples while maintaining participant comfort, proper technique, and specimen integrity throughout the process.

A wide variety of tests are offered through the venipuncture blood draw program. Samples are collected and spun down on-site and sent to our lab partner, Clinical Reference Laboratory (CRL), for processing. The specific tests ordered by the client will be listed on the event worksheet.

Participants will receive their results online, within two weeks of the event. A text message will be sent to the participant when their results are ready.

Blood Draw Collection Kits

Each blood draw collection kit includes pre-labeled tubes, safety needle, collection hub, barcode stickers, gloves, alcohol swab, gauze pad, and bandage.



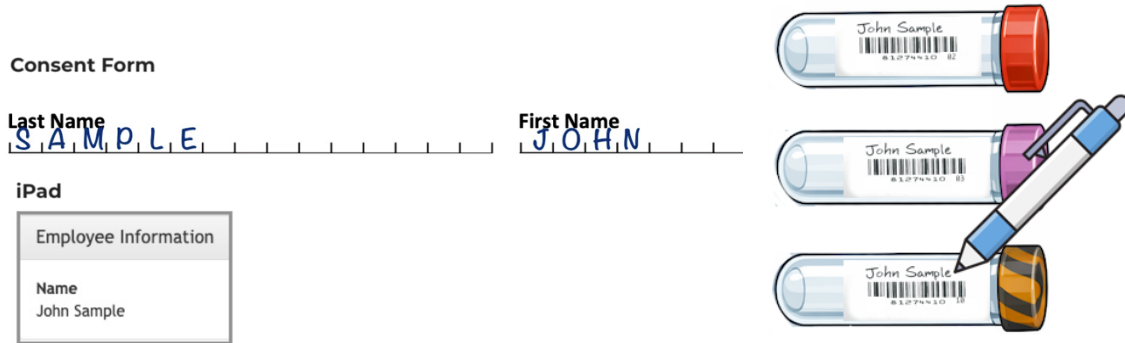
Collection Tubes

Your event worksheet will indicate the tubes that need to be collected.

| Service Name | Tubes to Collect |
|-------------------------|----------------------------------|
| Venipuncture Blood Draw | Tigertop/Red Tube, Lavender Tube |

Measurement

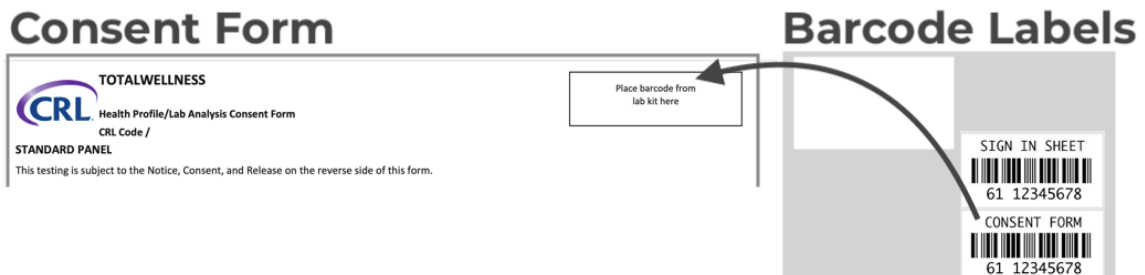
1. Open a new blood draw kit.
2. Write the participant's name (exactly as it appears on the iPad or paper consent form) on all tubes that will be utilized.



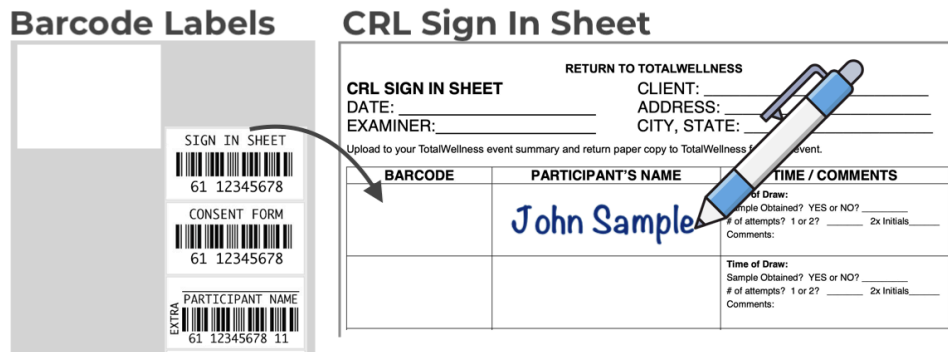
3. Document the participant's barcode:
 - a. iPad – Type the first 10 digits of the barcode into the 10-Digit Consent Form Barcode ID Field within the iPad.



- b. Paper Consent – Adhere the provided Consent Form barcode sticker to the participant's consent form.



4. Complete the Sign-In Sheet
 - a. Locate the Sign-in Sheet barcode sticker and add it to the sign-in sheet.
 - b. Document the participant's name on the sign-in sheet.



Select an Arm

5. Select the arm with the best vein for sample collection.

Sample Collection

6. Collect samples in the following order:
 - a. Tiger Top/Red Top Tube
 - b. Lavender Tube

Tiger Top/Red Tube Collection

7. Collect the blood sample in the BD serum separator (Tiger Top) vacutainer tube using proper venipuncture techniques.



8. Allow the sample in the serum separator (Tiger Top) tube to clot.
 - a. Allow the sample to clot for at least 10 minutes, but not more than 45 minutes.

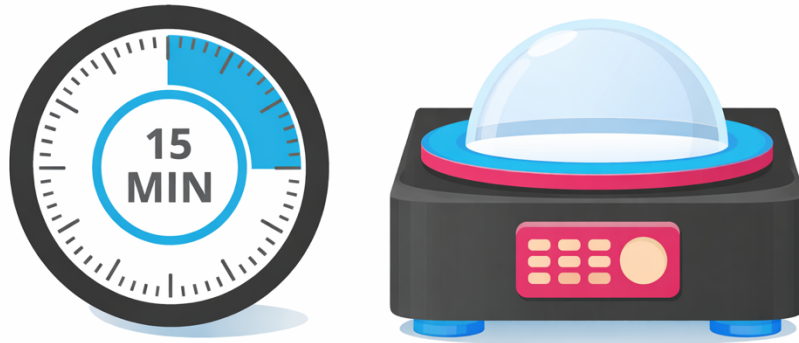
Clotting Time



✓ DO
Wait at least 10 minutes to allow the sample to fully clot before centrifuging.

⚠ DO NOT EXCEED
Process within 45 minutes. Delayed processing may compromise sample integrity and results.

9. Centrifuge the serum separator (Tiger Top) tube for 15 minutes on high speed.
 - a. Complete this process while on-site at the event.
 - b. Ensure the centrifuge is balanced and stable when spinning.



10. Locate the Red Top tube with the matching participant name and barcode.
 - a. The first 10 digits of the barcode will match on each tube.
 - b. Always double check that barcodes match before continuing.



11. Pour off serum from the Serum Separator (Tiger Top) tube into properly labeled/barcoded Pour-Off (Red Top) tube
12. Securely cap the Red Top tube.
 - a. Ensure cap is flush to avoid leakage during shipping.
13. Dispose of Serum Separator (Tiger Top) tube in biohazard container.

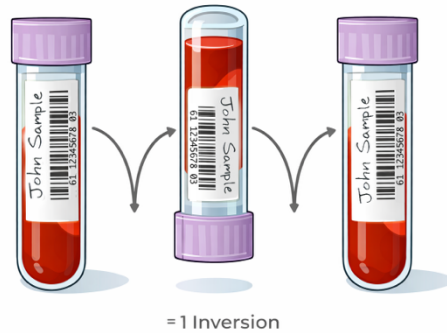


Lavender Top Tube Collection

14. Collect blood samples in Lavender Top tube using proper venipuncture techniques.



15. Mix lavender top tube by inverting tube 10 – 20 times. DO NOT centrifuge.




Participant Care

16. After samples have been collected, apply pressure with gauze to the collection site and then apply a bandage.

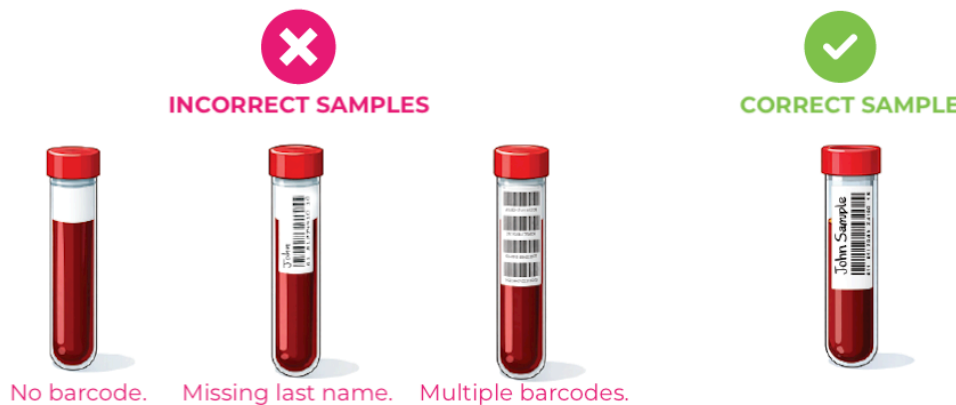
Documenting Results

17. Document your collection results on the CRL Sign-In Sheet.

| BARCODE | PARTICIPANT'S NAME | TIME / COMMENTS |
|---|--------------------|--|
| SIGN IN SHEET  61 12345678 | John Sample | Time of Draw: Sample Obtained? YES or NO? <u>Yes</u> # of attempts? 1 or 2? <u>1</u> 2x Comments: No Issues |

18. Complete any remaining fields in the iPad or on the consent form, including the examiner information section.

19. Double check tube labels and barcodes. Samples will be rejected for missing barcodes, missing names, multiple barcodes and improper labeling.



New Tubes and Second Attempts

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 the participant's lab kit for the new tube.
 - Tubes with multiple barcodes will be rejected.
- Only two attempts should be made on a difficult stick.
 - If another contractor is on-site, 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 client policy.

Centrifuging Tips

Tubes

Tiger-Top Tubes – YES! Centrifuge Serum Separator (Tiger Top) tubes.

- Allow sample to clot for at least 10 minutes, but not more than 45 minutes prior to centrifuging.
- Centrifuge on **high speed for 15 minutes**.
- After centrifuging, pour off serum from the Serum Separator (Tiger Top) tube into properly labeled/barcoded Pour-Off (Red Top) Tube
 - The Red Top tube will have the same participant's name on it and the first 10 digits of the barcode will match the Tiger Top tube.
- Securely cap Red Top tube.
 - Ensure cap is flush to avoid leakage during shipping.
- Dispose of Serum Separator (Tiger Top) tube in biohazard container.

Lavender Top Tubes – NO! Do Not Centrifuge!

- Mix Lavender Top tube by inverting tube 10 – 20 times.

Balancing the Centrifuge

Centrifuges need to be balanced to spin properly. Balance your centrifuge before spinning by:

- Placing tubes across from one another and evenly spacing them in the centrifuge.
- Always using an even number of tubes.
 - If you have an odd number of tubes to spin, fill an extra unused Tiger Top tube with water.
 - Place the water tube across from the tube with a sample to counterbalance the centrifuge before spinning.

Placement of the Centrifuge

Centrifuges need to be placed on a hard, flat surface prior to use. A large, flat table close to an outlet may be a good choice, but often the floor is the best location for your centrifuge.

- As the centrifuge spins, it may "walk" across surfaces. If your centrifuge is "walking" across a table, move it to the floor to prevent it from falling off the table.
- As your centrifuge spins, it may be loud. You can reduce the noise by placing the centrifuge on a carpeted floor.

Using the Centrifuge

Upon receiving your centrifuge, plug it in and turn it on to ensure it is working. Centrifuges tend to get damaged during the shipping process, so it is important to check their functionality when you receive them.

- The lid must be locked for the centrifuge to spin.
- The centrifuge will start with a slow spin before getting up to full speed.
- The centrifuge includes a timer that can be set to 15 minutes, and the machine will automatically stop once the 15 minutes are up.
 - o If the 15-minute timer does not seem to be accurate or you have a personal preference not to use it, set a 15-minute timer on your phone or watch.
 - If using this method, be sure to set the dial on the centrifuge to past 15 minutes and then manually move the dial to done when your 15-minute timer goes off.

Processing the Samples

Tiger-Top Tube samples need to clot for at least 10 minutes, but not more than 45 minutes. They then need to be centrifuged for 15 minutes. Due to the variable timing, it is important to centrifuge all samples that are ready at the same time. This will help ensure the centrifuge is available when needed, not already spinning samples.

Organizing Consents & Tubes

Always keep paper consent forms and tubes together. Utilize a system that works for you to keep everything organized.

Generally, we recommend keeping Red Top tubes on top of the participant's consent form. You can then easily find the correct Red Top tube when it comes time to pour the sample from the Tiger Top tube into the Red Top tube.

Troubleshooting Broken Centrifuges

Call TotalWellness immediately if you have a broken centrifuge and we will assist with troubleshooting the situation.

Packaging Samples

Package blood samples by following the steps below.

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 manila envelope of consent forms (if applicable) into the lab pack and securely seal closed.
8. Affix overnight shipping label (addressed to Wellness IB, Clinical Reference Labs in Lenexa, KS) to outside of lab pack.
9. Record the tracking numbers, content of packages and shipping information on the Clinical Reference Lab (CRL) Wellness Sample Tracking Form.
10. Drop off samples at a staffed facility that accepts FedEx packages before the last pickup of the day.
11. Upload Barcode Sign-In Sheet(s) and CRL Wellness Sample Tracking Form with your event summary and return paper copies to TotalWellness in your return supply shipment.

Important!

Venipuncture blood samples and paper consent forms go to Clinical Reference Lab (CRL) NOT TotalWellness.

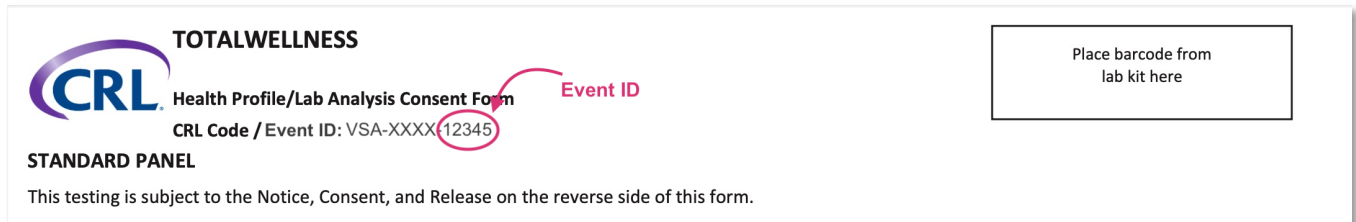
Clinical Reference Lab
11711 W 83rd Terrace
Lenexa, KS 66000

FedEx Drop Off

Samples must be dropped off after each event, at a staffed location that accepts FedEx packages, by the last pickup of the day. If you miss the cutoff, call TotalWellness for assistance.

Paper Consent Forms

Venipuncture paper consent forms are event specific and include the event ID on the top. These forms are sent to the Primary Contractor in their shipment. If a primary contractor is working multiple venipuncture events it is important to organize the consent forms and utilize the correctly labeled ones for each event. The event ID listed on the top of the consent should match the event ID on your worksheet.



TOTALWELLNESS
CRL Health Profile/Lab Analysis Consent Form
CRL Code / Event ID: VSA-XXXX-12345 **Event ID**

STANDARD PANEL
This testing is subject to the Notice, Consent, and Release on the reverse side of this form.

Place barcode from lab kit here

If the paper consent forms were not received OR if an event was set up to use iPads and needs to switch to paper consent forms, copies of the consent form can be made; however, you will need to modify the consent prior to making copies by either crossing out or covering up the barcode in the lower right-hand corner of the form.



COMMENTS

Wellness Form WLS_MAX / 8534241205133743 White Copy - Lab

FORM ID: 00000000000

Crossout or cover before copying.

Additional Details

- 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.
- Fine point sharpies work well to write names on tubes.
- It is up to the screener's discretion if the participant is a good candidate for a venipuncture blood draw. If the participant has a tendency to faint or struggles with the sight of blood it may be wise to recommend, they visit their primary care provider for their venipuncture draw.

Results Review

Results Review



Procedure

Supplies

- 1 Table
- 2 Privacy Screens
- Paperwork to distribute
- 2 Chairs
- 1 iPad

Definition & Purpose

Results review in a corporate setting is intended to provide participants with a clear, brief, and informative understanding of their results. As a contracted healthcare professional, you play a key role in delivering this experience in a way that is supportive, professional, and easy to understand.

Implementation

Welcome

- Welcome the participant and introduce yourself.
- Explain that you will be “explaining the meaning of the participant’s numbers today.”
- Ensure both the handout and consent form/iPad include all of the participant’s values.

Review Results

- Use the handout or onsite data collection results review screen to guide the participant through each result.
 - Point to the results, never say values out loud and avoid visible, verbal or nonverbal cues as to what health data you might be discussing.
- Explain what each reading is and if the participant is doing well or may have opportunities for improvement.

Next Steps

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

Paperwork

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

Contractor Success Tips

Duration

Limit results review to 3-5 minutes. When providing services in a pod format the entire screening duration, including results review, should be 10-15 minutes long.

Screening vs. Diagnosing

Corporate wellness services are for screening and education purposes only. They are not intended to diagnose. If an individual has elevated or at-risk values, they should always be referred to their primary care provider for follow-up.



Calling up Participants

Verify at least three data points (first name, last name, date of birth and/or unique ID) prior to reviewing results to ensure you have the correct participant.

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, explain 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 whether the participant fasted or not, but the result 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 at corporate wellness events 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. Many clients opt for 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. The wellness industry standard is to encourage healthy behaviors such as eating healthy and increasing physical activity, but not specifically recommend weight loss or weight gain.

Healthy Eating

Healthy eating habits can assist in improving values. Be sure to keep recommendations generic. Recommend increasing whole food consumption, such as fruits, vegetables, and whole grains and decreasing processed food consumption. Encourage moderation.

Clients frown upon specific recommendations. Do not encourage consumption of specific foods, avoidance of specific foods, any specific diet plan or vitamin supplements.

Physical Activity

Physical activity is 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. Also encourage participants to make exercise fun. They can do anything that interests them, gardening, dancing, yoga, etc.

Client expectations are that general, not specific, recommendations be provided.