

2009 Wellness Screening Program Guide

Presented By





Dear PBG Site Coordinator:

Welcome! Thank you for your assistance in organizing the Pepsi Bottling Group *Healthy Living* wellness screening.

Pepsi Bottling Group has teamed up with Summit Health, Inc. to offer onsite health screenings and health fairs. We look forward to planning these events with you.

This Guide contains comprehensive resources and information for easy program implementation. Please review the contents of this Guide. Customize and use these resources to implement the screenings and health fairs at your worksite.

We look forward to a successful event. Please contact us with any concerns or questions. Thank you for your help and coordination!

In good health,

Lisa Forgach

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Overview of Site Coordinator Responsibilities

As the Site Coordinator, it is your responsibility to partner with Summit Health to plan, promote, and execute a successful event.

Planning

Summit Health will be reaching out to all Site Coordinators to begin planning mid November. The initial phone call will consist of discussing both the Site Coordinator and Summit Health's responsibilities, event details, and the Service Order Request Form. *Please see the Site Coordinator Task Checklist on Page 5 for a detailed list of the Site Coordinators planning Responsibilities.*

Promoting

After a date and time have been determined, it will be the Site Coordinator's responsibility to begin promoting the event. Summit Health will provide Posters for each location as well as an Appointment Tool to manage the screening appointment times. *Please see the Site Coordinator Task Checklist on Page 6 for a detailed list of the Site Coordinators promoting Responsibilities.*

The Day of the Event

If a Summit Health representative will be present to staff the registration table, the Site Coordinator needs to greet the screening team one hour before the screening and assist with set-up. It is recommended, but not required that the Site Coordinator stay in the screening room for the duration of the screening. It is appreciated if you stop by to check in throughout the screenings. Please let the screening team know what the best way to contact you will be and assign a backup in your place to field screening staff questions.

If a Summit Health representative will **not** be present to staff the registration table, the Site Coordinator will need to greet the screening team one hour before the screening and assist with set-up, and is required to stay in the screening room for the duration of the screening. If you are not able to be present for the entire screening, please delegate someone from your staff to fill in.

Your responsibilities at the screening will be as follows:

- Greet employees as they arrive and positively promote the event throughout the day
- Manage the screening sign- up sheet and work with shift supervisors to allow all employees wanting to participate the opportunity to do so. Manage walk-ins.
- Instruct employees to read and sign the screening Consent Form and be sure it is signed before directing employees to the first screening station

Note: Determine if Summit Health will manage registration well in advance of your screening event.

Please refer to Attachment 1 for additional Frequently Asked Questions that may also be shared with employees. Be sure to familiarize yourself with these questions in order to effectively answer employee questions. *Please see the Site Coordinator Task Checklist on Page 8 for a detailed list of the Site Coordinators day of event Responsibilities.*

Site Coordinator Task Checklist

Managing a health screening at your site includes planning, promotion, implementation, and evaluation. Use this checklist as a guide to assist you during the screening process.

Planning

6 to 8 Weeks prior to the screening

<input type="checkbox"/> Confirm event date and time with Summit Health and PBG HQ	[Date]
<input type="checkbox"/> Discuss number of participants and examiners needed for your event	
<input type="checkbox"/> Participate in conference call to review Guide	[Date]
<input type="checkbox"/> Reserve rooms, tables, chairs, etc., for scheduled dates <ul style="list-style-type: none"> ▪ Screening rooms should have adequate space for all examiners and registration area. Please assure the space is large enough to guarantee privacy for all participants (refer to diagram on page 10 for sample room layout). ▪ Each examiner will need a table, two chairs (non-rolling), a waste basket, and an electrical outlet. 	[Date]

4 to 6 Weeks prior to the screening

<input type="checkbox"/> Complete and submit Service Request Order Form , including specific directions to sites, location of screening room, access to building, site coordinator contact information, recommendations on local hotels, etc.	[Date]
<input type="checkbox"/> Participate in the Appointment Tool Training call	[Date]
<input type="checkbox"/> Participate in Bi-weekly calls with Summit and Pepsi to go over event details	[Date]
<input type="checkbox"/> Reserve parking and provide security clearance for screening staff if necessary	[Date]

Site Coordinator Task Checklist

Promotion and Registration

Ongoing (begin 2 to 4 weeks prior to the screening)

<input type="checkbox"/> Familiarize yourself with the FAQs to knowledgeably answer employee questions <ul style="list-style-type: none"> ▪ Refer to FAQs in Attachment 1 and/or contact Summit Health with additional questions 	[Date]
<input type="checkbox"/> Promote screening internally through word of mouth (i.e., attends departmental meetings, recruit champions, etc.)	[Date]
<input type="checkbox"/> Send introduction letter/e-mail to all employees encouraging participation	[Date]
<input type="checkbox"/> Post screening posters (receive from Summit Health two weeks prior to event)	[Date]
<input type="checkbox"/> Customize promotional E-mails and pay roll stuffers and distribute as appropriate <ul style="list-style-type: none"> ▪ Refer to attachments for templates 	[Date]
<input type="checkbox"/> Send invitation to employees to schedule a screening appointment* <ul style="list-style-type: none"> ▪ See Appointment Tool Instructions on page 11 ▪ Refer to "Registration E-mail" template (Attachment 3) ▪ Include FAQs as an attachment if desired (Attachment 1) 	[Date]
<input type="checkbox"/> Registration for screenings begins	[Date]

1 Week prior to the screening

<input type="checkbox"/> Send reminder to employees to schedule an appointment <ul style="list-style-type: none"> ▪ Refer to "Reminder to Register E-mail" template (Attachment 4) 	[Date]
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1 Day prior to the screening

<input type="checkbox"/> If desired, send individual event reminder e-mail to employees <ul style="list-style-type: none"> ▪ Refer to "Event Reminder E-mail" template (Attachment 5) 	[Date]
<input type="checkbox"/> If desired, send individual reminders noting the wellness screenings completion instructions <ul style="list-style-type: none"> ▪ Refer to Attachment 5 	[Date]

*Contact Summit Health in a timely manner if the screening schedule is filling up too quickly (i.e., more time slots are needed) or too slowly (i.e., need more promotion ideas).

Site Coordinator Task Checklist

Confirmation

2 to 4 Weeks prior to the screening

<input type="checkbox"/> Confirm reservations for rooms, tables, chairs, etc., for scheduled dates	[Date]
<input type="checkbox"/> Receive call from Summit Health to confirm details of the screening event <ul style="list-style-type: none">▪ Discuss room layout▪ Provide Summit Health with an update on registration schedule and confirm information on number of screening staff to expect▪ Confirm you have received all necessary materials from Summit Health	[Date]
<input type="checkbox"/> Receive promotional materials for screenings <ul style="list-style-type: none">▪ Materials may include: Posters and Healthy Changes Brochures.	[Date]

1 Week prior to the screening

<input type="checkbox"/> Confirm that your schedule is clear for the screening day(s) and identify a resource to cover your regular day-to-day responsibilities, if needed	[Date]
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1 Day prior to the screening

<input type="checkbox"/> Summit Health will contact each Site Coordinator to ensure all preparations have been fulfilled	[Date]
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Site Coordinator Task Checklist

Implementation

Day of the health screening

-
- Ensure the event rooms have been properly set up and assist Summit Health staff with any room-related problems

 - Print screening schedule and bring to screening room

 - Arrange any refreshments that will be provided

 - Greet and direct health screening staff to the appropriate room(s)
(examiners will arrive one hour early for set up)

 - Take digital photos of the event and participants

 - Screening flow:
 - It is the responsibility of the Registration Clerk to (either a Summit Health Representative or Site Coordinator) manage the flow of the event. Each examiner will see one participant at a time. The entire screening will be completed at one station.
 - Each participant will be seated for about 15 minutes. During that time the participant's height, weight, body mass index (BMI), blood pressure, cholesterol, and glucose levels will be determined. In addition, each participant will receive brief (2-3 minutes) counseling on results.
 - Following the brief counseling the examiner will provide each participant with a yellow copy of the Consent Form noting his/her results and other helpful materials (i.e. Healthy Changes brochures).
 - After completing the screening, encourage employees to complete their Wellness Assessment (WA) at home or at the computers/laptops provided following their health coaching session.
 - The last step is for the employee to complete a screening Satisfaction Survey. The examiner will provide the survey after results have been discussed with the employee. The employee will return the completed survey to the Summit Health examiner

 - Greet employees as they arrive and positively promote the wellness screening

Day of the health
screening cont.

Site Coordinator Task Checklist

Day of the health screening cont.

- Check in employees (if there is no Summit Health registration staff at your event)
 - Highlight their name on the schedule. If the person does not have an appointment, write his/her name at the bottom of the list and inform the screener that there is a walk-in (those with appointments should receive priority).
 - Instruct employees to read and sign the Screening Consent Form. All screening employees must sign the form before being directed to a screening station.

- Manage the screening schedule and **contact employees if they are late**





- Be available to field employee and screening staff questions and designate a back up if you are not available

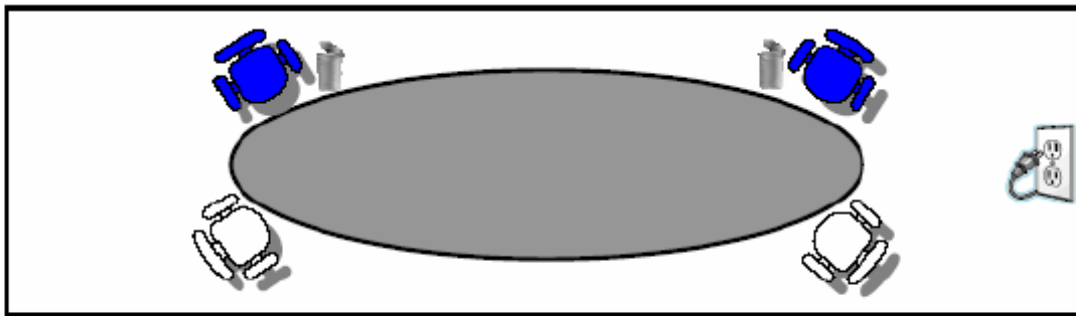
- Assist employees and the screening staff with any room-related problems

- Complete Site Coordinator evaluation survey (brought by Summit Health) and return to Summit Health staff (See copy on page 12)

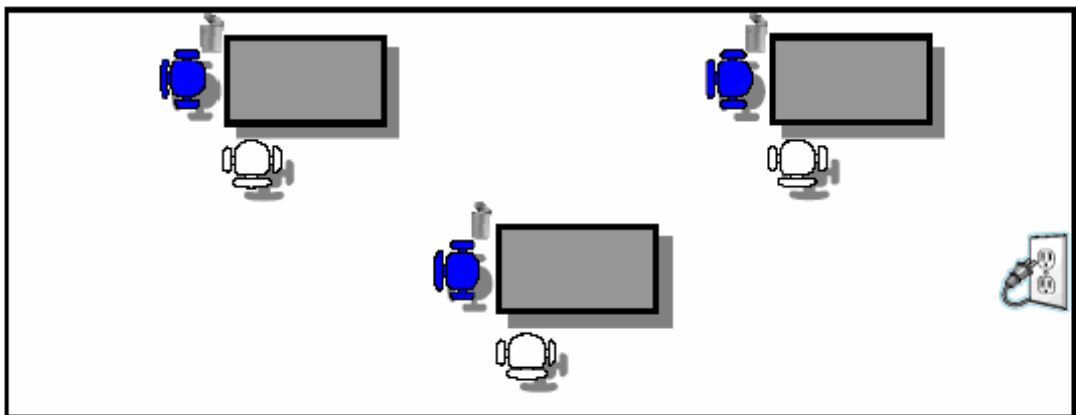
Thank you for your time and effort in planning PBG's screening events!

Screening Room Layout

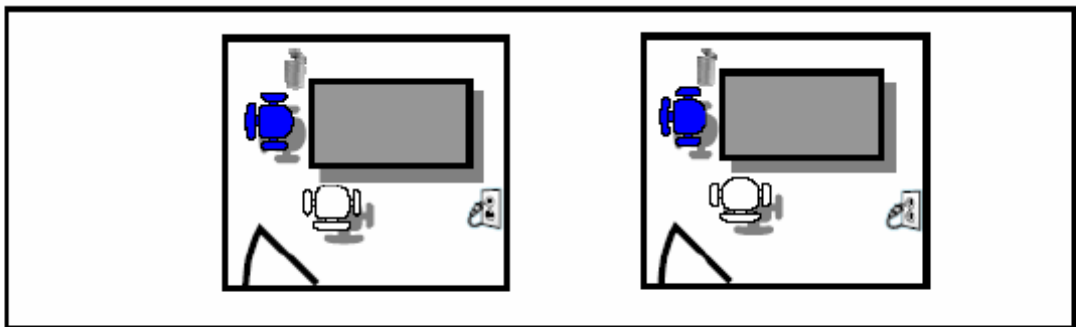
-  - Indicates Examiner
-  - Indicates wastebasket
-  - Indicates Participant
-  - Indicates electrical outlet



Option "A" (Conference Room)



Option "B" (Large Room with separate tables)



Option "C" (Separate Rooms)

(Choose option that best applies)

Appointment Tool

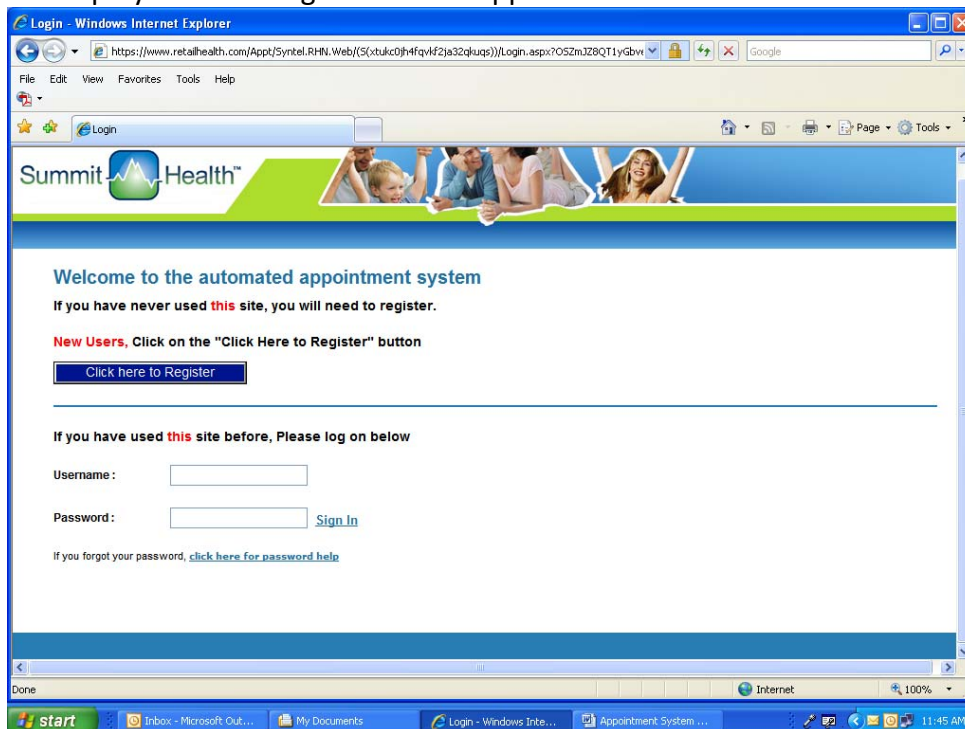
Please encourage employees to schedule an appointment for the screening using the Appointment Tool. An appointment will guarantee the employee will be screened on the day of your event. If no appointment is made, then the employee is not guaranteed to take part in the screening.

Walk-ins are able to participate in the screening if an examiner is available. However, employees with appointments have priority over all walk-ins.

Keep in mind you, the Site Coordinator, may be making the majority of appointments for employees.

Below are brief instructions on how to use the Appointment Tool.

- 1) An employee would register for the appointment and create a Username and Password.



- 2) An employee would choose which State, City, Address, and Date for his/her appointment.
- 3) An employee would then choose a time for his/her appointment
- 4) Last, the employee would confirm the date and time.

**Each Site Coordinator will be given a SuperUser name and password in order to create/manage employee appointments.

Summit Health will provide training on how to use the Appointment Tool. Please contact Lisa Forgach with any questions at 248-416-1624 or email lforgach@summithealth.com

PBG Screening Site Coordinator Satisfaction Survey

The survey below is to be completed by you, the Site Coordinator, the day of your event. The Summit Health Staff will bring the Scantron document the day of your event. **Please complete the survey and return to the Summit Health staff upon the completion of your event.**



2009 PBG COORDINATOR SATISFACTION SURVEY

INSTRUCTIONS: Please rate your satisfaction in the following areas. Use a No. 2 pencil only. Do not use ink pens. Fill in the circles completely and make no stray marks on the form.

	VERY SATISFIED	SATISFIED	UNDECIDED	UNSATISFIED	VERY UNSATISFIED
1. Professionalism, courtesy and knowledge of screening staff.	4	3	2	1	0
2. Explanation of screening objectives and procedures.	4	3	2	1	0
3. Explanation and consultation of screening values.	4	3	2	1	0
4. Screening flow and time allowed for appointment.	4	3	2	1	0
5. Did the staff arrive on time and stay for the duration of the event.	4	3	2	1	0
6. Overall health screening experience.	4	3	2	1	0
7. Additional comments:	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/>				

Attachments

- **Frequently Asked Questions**
- **Screening E-mail Promotions**
- **Invitation to Register E-mail**
- **Screening Appointment Reminder**
- **Wellness Screenings Completion Instructions**

Frequently Asked Questions

Summit Health

Who is Summit Health Management?

Summit Health, Inc. is the nation's leading provider of comprehensive wellness, health screening, and immunization programs. In 2007 Summit Health, Inc. touched over 1,200,000 lives by conducting over 20,000 health screening clinics and flu shot programs across all 50 states and Puerto Rico.

Health Screening

Why should I participate in the health screening?

Even healthy individuals have discovered areas of concern through a health screening. If your results do not indicate a problem, it verifies your lifestyle is working for you. Your participation will also support your colleagues in making positive lifestyle changes.

Who is eligible to participate in the screening?

Scheduling priority will be given to full time PBG employees who are eligible for the PBG benefits. Other employees and spouses will be accommodated to the extent possible.

How do I register for the health screening?

To register for the health screening, contact your Site Coordinator. Although walk-ins will be accepted, scheduled appointments will take priority.

Why should I pre-register on-line?

Pre-registering guarantees you will be screened the day of your event. If you do not pre-register you are not assured to be screened that day. Walk-ins are welcome, however all employees with appointments have priority.

How long will the health screening take?

The health screening will take approximately 15-20 minutes.

What values will be measured during the health screening?

The health screening includes measurements for height, weight, blood pressure, body mass index, total cholesterol, HDL and glucose. Results will be reviewed during your screening appointment with a health professional.

How will my cholesterol be checked?

The fingerstick method of blood draw is used to measure cholesterol. This is easy and fast. You will receive immediate results and a brief onsite consultation with a certified health professional. The screener will "prick" your finger and place the blood sample into the Cholestech machine. The machine automatically reads the blood and provides results within 10 minutes.

Frequently Asked Questions

Health Screening (cont.)

Do I have to fast before the screening?

No. Non-fasting tests are accurate for measuring your total cholesterol, HDL cholesterol and blood glucose. If your test results are borderline or high, the staff at the screening will encourage you to see your physician for a comprehensive fasting blood test.

If I am advised to seek immediate medical attention as a result of elevated values, will my medical expenses be covered by PBG?

No. You will be responsible for all charges not covered by your health plan. The advice of the screening staff is a recommendation only and should not be treated as medical advice.

Do I have to complete all of the screenings?

No. You are encouraged to complete all components, but you may choose to omit a component if necessary. Your Wellness Assessment (WA) results will be more accurate if your cholesterol and blood glucose levels are included, but this data is not required for valid WA results.

What if I can't attend a screening?

If you have current (obtained within the last 6 months) blood pressure, cholesterol and/or blood glucose readings, you may enter those results into the WA. If you do not have current readings, you can schedule an appointment with your physician prior to completing the Wellness Assessment.

Confidentiality

Will my screening results be kept confidential?

Yes, all information is treated as confidential medical information. You allow Summit Health, a third party, to handle this information by signing the Screening Consent Form. Your personal results will not be shared with anyone at PBG. Summit Health administers the screenings to ensure confidentiality and is held to strict privacy and security laws.

Is it necessary to provide my Social Security number on the Screening Consent Form?

No, you are only required use the last four digits of your Social Security number for verification purposes to complete the Wellness Assessment. Summit Health does require you to write the last four digits of your Social Security number on the consent form.

What if I don't agree with the Screening Consent Form?

You will need to sign a Screening Consent Form to participate in the screening. If you do not consent, you will not be allowed to participate. Summit Health is required by law to receive employee consent prior to obtaining confidential medical information.

Screening E-mail Promotions

Introduction E-mail

Subject Line: *Choose the right path to better health*

Don't miss this great opportunity! PBG has teamed up with Summit Health Management to offer onsite health screenings at your location. You will be able to evaluate your lifestyle-related health risks and receive information on how to make positive changes to enhance your health and well-being. Screenings include measurements for height, weight, blood pressure, total cholesterol, HDL and glucose.

This voluntary program gives you a big picture look at your overall health and lifestyle. All you need to do is attend the onsite screening.

The screenings are confidential, free and voluntary. For your participation you'll receive important information about your health, as well as [incentive]. Watch for more information coming your way and choose your path to better health.

Don't forget that you and your eligible spouse or domestic partner can receive \$75 each just for completing the Wellness Assessment by March 31, 2009.

Invitation to Register E-mail

Subject Line: *Register now and make the most important investment of your life*

Where else can you invest in your health and receive a lifetime reward?

PBG invites you to register for the onsite health screening where you will receive screening values for height, weight, blood pressure, total cholesterol, HDL, and glucose (your finger will be pricked to draw blood for the test). Results will be provided within minutes and reviewed by a health professional. The program is voluntary, free and completely confidential.

[Attendees will have a chance to win (or receive) XXX.]

To register for your screening, [method of registration].

Health Fair Information:

Date:

Time:

Location:

For more information contact [site coordinator contact information] or refer to the attached Frequently Asked Questions.

Don't forget that you and your eligible spouse or domestic partner can receive \$75 each just for completing the Wellness Assessment by March 31, 2009

Screening Appointment Reminder

Reminder to Register E-mail

Subject Line: *It's not too late to register for your Health Screening!*

Join your PBG colleagues at the Health Fair on [date]. If you have not yet registered for your onsite health screening, be sure to [method of registration] to register today. Take ownership of your health and sign up for your confidential health screening.

[Attendees will have a chance to win (or receive) XXX.]

Health Fair Information:

Date:

Time:

Location:

For more information contact [site coordinator contact information].

Wellness Screenings Completion Instructions

Name		
Your Appointment	Date:	
	Time:	
	Location/Room:	
Instructions	<ul style="list-style-type: none">• Arrive promptly for your scheduled appointment. We want to keep the event running smoothly and on time for all participants.• Wear loose clothing. Loose clothing or a short-sleeved shirt is needed to take your blood pressure measurement.• Avoid foods high in sugar. To ensure an accurate blood glucose reading, please refrain from eating high-sugar foods (i.e., donuts, soda or juice) immediately prior to your appointment.	
Questions?	If you have any questions, please contact [Site Coordinator] at [Phone Number].	