

Best Practices in On-Site Wellness Series:
Guidelines for Choosing a Health
Screening and Flu Shot Vendor



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CASE STUDY: The human resource department and medical director of a Fortune 500 company based in the Midwest were looking for a vendor to conduct on-site employee health screenings. After an exhaustive RFP process, a local vendor was selected based on proximity and pricing. The vendor would be responsible for delivering on-site health screenings at the company's locations in 15 states. Unfortunately, the HR department and medical director did not realize that the vendor they selected was not licensed to conduct health screenings in all 15 states, exposing the manufacturing company to a host of potential legal and regulatory problems. Furthermore, some of these states were "red light" states that require licenses, event notification, permits, and quality assurance above and beyond the federal standard for on-site health care services.

Executive Summary

Today, more companies are implementing wellness programs in order to improve the health and productivity of their employees, while at the same time reducing overall health care expenses. However, it is easy to think of health screenings as a commodity instead of what they truly are – health *care*.

Many corporate human resource and benefit managers are unaware that health screening procedures are closely regulated from both a federal and state standpoint. In one state procedures are even regulated at the county and city level. They are further surprised to learn that the majority of health screening and "wellness" companies are *not legal* in all 50 states and do not always follow federally mandated procedures to protect HIPAA data and provide quality biometric results. To complicate matters, the on-site health screening industry is not regulated by one governing body, making it difficult for companies to go to a single reference to help them in selecting the right health care partner.

Whether it is an on-site flu shot or biometric health screening program, a well-run event conducted by a qualified provider who delivers quality results is a very positive experience for everyone involved. When employees have a positive experience with a professionally trained and qualified screener, they tell others, which leads to greater engagement and commitment to make the necessary lifestyle changes.

Selecting the wrong partner can lead to legal and regulatory issues, loss in employee confidence, inaccurate test results, and a significant setback for a company's wellness program. A company would never send an employee to a doctor that is not licensed, but every day companies unknowingly let

unlicensed or under-qualified wellness and health screening practitioners onto company property to deliver health care services to their employees.

Purchasing on-site health screening and flu shot (“health care”) services is not like purchasing office supplies. Selecting an organization that is not legal, underinsured for liability, or has inadequate HIPAA compliance and data security procedures can be disastrous. This white paper addresses a list of key elements organizations need to consider when selecting an on-site wellness partner for health screenings and immunizations. The paper also goes on to provide you with specific questions to assess potential vendors in these critical areas.

The On-Site Wellness Industry: Where We Are Now

As insurance premiums and health care costs have soared, so has the popularity of company wellness initiatives. Consequently, the on-site wellness market is growing rapidly, and a large number of new and inexperienced vendors — including smaller, regional players — are entering the marketplace. While on-site health events are critical to a wellness program’s success, quality standards that govern these on-site wellness vendors are not well defined and enforced.

This industry is in its early, “wild, wild West” stage and therefore is not consistently regulated. For example, there are national and local regulations regarding finger sticks and blood draws, but there is no single organization or regulatory body that sets standards for on-site health screenings or flu shot programs across all 50 states and corresponding counties. The result is a significant variation in licensure, security and confidentiality practices, and the quality of screening staff. Customers need to be careful in selecting a health screening and flu shot partner. If the problems are serious enough, the decision maker who chose the vendor could be held responsible.

An old saying in the business world was “No one ever got fired for buying IBM.” In today’s on-site wellness industry, this translates to working with a reliable, legally compliant vendor who has invested in quality and security at every step and has a good track record. However, many newer vendors do not have the resources (people and financial) or the knowledge to meet all the federal, state, and local requirements or best practices for on-site wellness and flu shot programs. On the surface, these vendors may offer a lower per-person cost, but it could very well be at the expense of safety, quality, and regulatory compliance. How can you be sure that your wellness provider meets basic quality standards and will deliver a successful program?

Customers need to be careful in selecting a health screening and flu shot partner. Selecting the wrong partner can lead to legal and regulatory violations, lawsuits, employee distrust, inaccurate test results, and a significant setback to a wellness program.



There are many points to consider and many questions to ask, but this paper will focus on the four critical, overarching questions to ask your prospective vendors:

1. Are you legal?
2. Are you secure?
3. Is your staff qualified?
4. Are you insured?

1. “Are you legal?”

Many on-site wellness program vendors are not compliant with all the federal, state, and local requirements. Customers are usually unaware of these requirements or simply assume the vendor is compliant. But unfortunately, that is not always the case. For example, a Fortune 500 company is using a vendor who is not licensed by the state to conduct screenings in all the host company’s offices, located in various states. The vendor is also deploying staff without the required licensing/certification. If something goes wrong, the host company, not the vendor, can be legally liable – including state fines and the risk of employee claims. Not to mention the public embarrassment and damage to the company’s brand from the negative press coverage.

***CASE STUDY:** When employees walked into the health screening room, they were surprised – and a bit unsettled – by a screening staffer who sported camouflage pants and a nose ring and reeked of cigarette smoke. While preparing to draw blood, the staffer accidentally stuck himself. He blew the needle “clean” and prepared to draw an employee’s blood with the same needle.*

Imagine yourself as the next patient. To avoid this situation, investigate these areas before choosing your vendor:

CLIA. In response to public health concerns over the largely unregulated laboratory services industry, Congress passed the CLIA ‘88 – Clinical Laboratory Improvement Amendments (42 CFR 493) – to establish standards for laboratory staff, including appropriate training, safety guidelines, and to ensure the accuracy and reliability of test results. To operate legally in every state, a vendor is expected to comply with the CLIA ‘88 guidelines with respect to good laboratory practices before applying for and receiving a federal CLIA certificate.

States. Some states require licensure according to that state’s specific public health code, which sometimes includes an additional county or city licensure requirement. For example, California requires on-site screening vendors to

register as a “non-diagnostic general health assessment laboratory” (NGHA) before they can conduct screenings in the state. Then, the vendor must contact each County Public Health Department, obtain a county-specific NGHA application, and submit supporting documentation (approved procedures, notification, personnel licensure and training documentation) proving compliance with the County’s own regulations. California state regulations require all health screening staff that conduct finger-stick testing to be state certified phlebotomists or state licensed health care professionals and show proof of training. California regulations also restrict blood draws for wellness programs.

Eighteen states have specific state rules and regulations in addition to CLIA (e.g. personnel requirements and on-site inspections). Sixteen additional states have requirements (e.g. state or county notification) that are not CLIA specific.

Medical Advisory Board. Staying compliant with CLIA and other regulatory requirements is detailed, time-consuming work that can be overwhelming without a significant investment and staff dedicated to that purpose. The best practice for legal compliance is to employ a vendor who has a Director of Regulatory Affairs that actively monitors all applicable regulations and ensures that the vendor meets all requirements. The director ensures all the company’s screening licenses and certifications are kept current, and also monitors any changes in federal, state, and local regulations.

The best practice is to have a Medical Advisory Board of at least five members and a licensed Medical Director who monitors that standing medical orders (health screening and immunizations) are maintained in all states in which the vendor operates.

Yes, it can be difficult to determine if a vendor meets all the federal, state, and local requirements. For federal requirements you can go to the Centers for Medicare & Medicaid Services website at www.cms.hhs.gov/clia. For state requirements, you can contact the Department of Public Health in the states where the health screenings are taking place to verify if a vendor is licensed. Please refer to the *Appendix* for specific questions to help determine if a vendor meets these requirements.

2. "Are you secure?"

CASE STUDY: After the screening clinic, the vendor screening team drove back to their rented office space above a strip mall to manually enter the patient data into laptop computers. To catch up on data entry, the office manager brought her laptop home. The next morning, the office manager was stunned to see her car broken into and the laptop stolen. The patients' names, addresses, birthdates, and private medical information — all gone. Back at the customer's executive suite, the CEO, General Counsel, and top managers dropped all their important business and huddled in crisis mode. At a minimum, they knew they had to protect their employees from medical fraud by securing credit monitoring services. But then what?

HIPAA. The Health Insurance Portability and Accountability Act (HIPAA) of 1996 gives employees greater assurance of and control over how their personally identifiable health information is used. HIPAA also requires health care providers (including on-site health screening vendors) to protect and maintain the privacy and security of health information. Still more requirements were added in 2009 with the HITECH Act ("Health Information Technology for Economic and Clinical Health Act").

How can you tell if a vendor is compliant with HIPAA privacy protection? To begin, ask if the vendor has a privacy officer and a Notice of Privacy Practices document that you can review.

- Will the patient's name or identifier appear on any take-away documents? If so, this can violate employee privacy if the handout is misplaced or left on a cubicle desk. Screening staff should give a sheet to each employee with their test results, but this sheet should not contain any identifying information.
- How is confidentiality maintained during the health screening? The clinic may be located in a small room, where others waiting in line can overhear test results. The vendor's screening protocol should be to point at written test results with a pen, but never to say them aloud.
- How is the staff trained on HIPAA compliance? The screening staff needs to be educated on what constitutes Protected Health Information, what rights patients have, what physical and electronic safeguards exist, and how to report violations or potential violations.

Data Transmission. HIPAA compliance extends beyond the actual screening event to how confidential health data is transported. Ask vendors how data is sent from the on-site clinic to their main office. Any data feeds must be secure to ensure that the data is not intercepted during transit. Standard email is not secure. Once the data has arrived at the vendor's office, it should be processed in a controlled room with a security lock and limited access to prevent unnecessary exposure of the data.

Data Storage. Finally, the method of health data storage is important. There are wellness vendors who routinely store clients' personal health data on unsecured desktop and laptop computers – a HIPAA violation that could result in data theft. The data should not be left on a desktop but stored on secure servers within a SAS 70 Type II Certified facility. SAS 70 is an acronym for Statement on Auditing Standard 70. Developed and maintained by the AICPA (American Institute of Certified Public Accountants), the SAS 70 certification ensures the data server is secure from theft and contains the necessary precautions (e.g. firewalls) that limit access only to authorized users.

Informed consent and health screening data are typically collected using paper forms. Most vendors keep these forms for a few years in their office or with a third party storage company. Unfortunately, holding onto paper with HIPAA data increases security risk. A best practice is to image the informed consent form and store screening data electronically, and then destroy all paper documents. Paperless storage is the best and safest option. Best practice is storage of electronic documents for seven years on a secure server with frequent back up, with automatic purging after seven years.

Engaging an on-site wellness or flu shot vendor who does not comply with HIPAA security requirements can lead to exposure of private health information – damaging your company's credibility, causing employee suspicion of your wellness program, and possibly seeing your name and your company on the front page of the newspaper.

3. "Is your staff qualified?"

CASE STUDY: During a flu shot clinic, a staff member accidentally gave two pneumonia shots instead of one flu and one pneumonia shot. The incident was reported to the company's Medical Director, who investigated the accident. The Medical Director discovered the staff member who gave a flu shot was not a nurse but a Medical Assistant (MA) who is not qualified to give a flu shot without a licensed doctor being present at the site. The company now faces a potential lawsuit from the employee who received two pneumonia shots.

Credentials. When it comes to health care, you cannot assume that a vendor has hired the most qualified, professional, or wellness-oriented individuals. You must be proactive in asking vendors about their hiring and training practices. Start by asking if vendors have conducted thorough background checks on all staff – and ask to see copies. Also, ask vendors if they have received and actually *checked* references for each staff member, and whether they conduct face-to-face interviews prior to hiring.

Professionalism. Ask if all staff have signed a written agreement on points such as smoking, tattoos, body piercings, perfume and dress code. Such a “Code of Conduct” is vital when people are entrusting their well-being to another. The signed Code of Conduct should also include tardiness, proper conversation with participants, and protection of HIPAA information.

Ask if staff licenses are up to date and if the vendor regularly checks and monitors expiration dates. Anyone can claim to be a health worker, so request to view the staff’s credentials. Find out what type of training the staff receives, and whether the training is ongoing or renewed regularly.

Ask to see a vendor’s training manual and video. This will allow you to see the information that is communicated to the staff prior to your clinic. Your vendor should maintain training and education records that show each staff member’s history of new skill certifications and continuing education.

4. “Are you insured?”

CASE STUDY: When the screening clinic was done, the vendor’s staff began packing up. A nurse slipped while carrying a heavy box of supplies, breaking her foot. Because the vendor did not have worker’s comp insurance, the host company had to pay the nurse’s medical expenses.

Not all vendors insure their subcontracted staff for workers compensation, professional and general liability, and automotive. If the uninsured subcontractor is injured at the site or in their car traveling to the clinic, you, the hosting company, may be left holding the bag and liable for the costs. Ask to see proof that your vendor has workers comp for its entire staff that will be at your site. Note that in three states (Ohio, North Dakota and Washington), the wellness vendor needs to purchase worker’s compensation insurance directly through the state and should show you these certificates.

Vendors should have general and professional liability insurance with a minimum of \$1,000,000 each occurrence and \$3,000,000 aggregate. Vendors should also have \$1,000,000 for hired and non-owned automotive insurance.

Worker's compensation should be a minimum of \$1,000,000 and should cover W-2 (employed) and 1099 (independent contractor) staff. A new insurance that is being requested is for Privacy, Network, and Media liability to help protect the loss or disclosure of confidential information. Liability insurance should be a minimum of \$1,000,000 in aggregate. In addition, the vendor should have excess/umbrella liability insurance of \$5,000,000 and insurance that covers damages to premises and sexual or physical abuse of \$500,000/\$1,000,000. The insurance company should have an AM Best rating of A-IX or higher and be willing to name your organization on the insurance certificate. You can verify an insurance company's rating on www.ambest.com, or similar website.

Other Points to Consider

The four critical areas discussed above all can result in serious legal consequences if ignored. In addition, there are some other important areas to address when evaluating prospective wellness vendors. These are summarized below, with relevant questions to ask your vendor listed in the Appendix.

Accuracy of Biometric Measurements:

CASE STUDY: An executive of a company participated in a health screening. The executive was given her cholesterol results at the health screening. The total cholesterol results were 80 points higher than the lab test she just received a few days ago from her doctor. The wellness vendor had old machines and had not verified calibration for months. The company cancelled the health screening since the results the vendor was providing were not accurate.

A worksite screening is of little value if the screening equipment is not reliable, accurate, and calibrated. Ask a prospective vendor to describe the quality control checks they perform on each machine prior to and throughout each health screening event. The machine being used should be FDA cleared and Cholesterol Reference Method Laboratory Network (CRMLN) certified. For on-site cholesterol screenings, the Cholestech LDX System is the "gold standard" for the industry. A best practice requires that each machine undergo quality control tests, with test results kept in a log (preferably electronic for automatic monitoring) for at least two years. Any machine that fails the tests should be removed from service until the appropriate corrective action has been taken.

Screening vendors should participate in a nationally accepted proficiency testing program or semi-annually conduct a correlation showing the accuracy of results compared to a reference laboratory methodology. Proficiency testing involves at least three challenges a year where unknown "patient" samples

are tested by staff using the vendor's machines. The results are submitted and evaluated by peer comparison studies to determine an acceptable range of results for the particular analyzer. The vendor is then scored on the accuracy of the overall testing process. Proficiency testing provides an independent, third-party, and nationally-recognized oversight of the vendor's ability to provide consistent and quality test results.

Data Integrity:

***CASE STUDY:** A company selected a blood-draw health screening for their program. Employees received their vital (blood pressure and body mass index) and laboratory test results in the mail. One employee received his results in the mail and found that the body mass index was different from what he was told at the health screening. Investigation revealed that the health screening vendor had mixed up some of the results and had wrongly entered data into their system. Word of the errors spread quickly through the employee population. Due to increased questioning of the validity of the results, the company chose to redo the entire health screening.*

Recording. Results forms and protocols should be designed for data collection efficiency and to minimize human errors of transcription or data entry. The Scantron is a best practice technique, especially when each form is preprinted with a barcode generated from an eligibility list or appointment system. This barcode uniquely identifies the employee based on a company's employee eligibility list. With the preprinted barcode, employees can skip the tedious and time-consuming task of filling out their name, address, and employee ID, thus enhancing the participant's experience.

Validation. Even with automation and scanning, errors can still slip through. By checking that each test result falls within a medically valid range, the vendor can isolate obvious errors (for example, a blood pressure of 12 that should have been 120). If an eligibility file is available from the customer company or its health plan, the screening vendor can also validate name, date of birth, and other unique identifiers, such as health plan member number or employee ID. This is critical if the screening results are used for an incentive, claims, or health management program.

Storage. The best of breed vendor stores health records in a secure relational database that prevents intermixing or crossover of data, with a unique ID assigned to each participant record. By including the date, employee, site, and company, this data can be compared over multiple years to help identify population trends. The server must have routine backups, physical security, emergency power, and state-of-the-art firewalls.

Pricing Policies:

CASE STUDY: One company completed their health screening program and a few weeks later received an invoice that was 30% above the approved budget for the program. The cost overrun on the program was due to travel and shipping costs that were added to the per person cost.

Check the fine print of your vendor contract before signing. Look for charges for travel, shipping of supplies, promotional materials, appointment system, data collection and transmission, and program management. You want a per person cost and all-inclusive pricing—not a combination of hourly rates plus per participant fees. This allows you to accurately determine a budget for the program, without unpleasant surprises when you get your bill. Make sure the vendor agrees to performance metrics in their delivery of the service, with financial penalties.

Turnkey Implementation:

CASE STUDY: A Human Resource Manager was tasked with implementing an on-site health screening program. This manager selected a vendor to conduct the program. Much to her surprise, she herself had to work late nights and weekends to implement the program. Her vendor provided very little guidance and support in rolling out the program, and was simply not available after normal business hours.

Select a vendor who offers a turnkey program with a single point of contact. Meet or have a call with the program manager before entering into a contract, and make sure they are available 24/7. This person should be the one consistent contact who: answers your questions and your employees' questions, organizes the wellness event, sets up the appointment system, sends out marketing promotional materials, and handles details for setting up the room where the wellness event occurs.

Also make sure the vendor is willing to work with you to customize a program that meets your needs, including private label branding, special data feed templates, unique protocols, and integration with your other employee benefit and wellness programs. Many vendors have services that are not customizable or flexible to meet the unique needs of customers.

Participant Experience:

CASE STUDY: During a health screening an employee was told his weight in a loud voice. This conversation was overheard by other employees who were waiting in line to be counseled. The employee was so embarrassed that he left the screening and submitted a complaint to Human Resources. The other employees waiting in line refused to continue with the screening due to the poor execution. Due to this incident, the company had to cancel their health screening the next year.

Single Station. Your screening vendor is crucial to satisfaction with the health screening experience, which in turn increases employee participation. Customers overwhelmingly prefer the “single-station” versus a “multiple station” (or “buffet line”) model to protect their privacy and confidentiality. In the traditional buffet line, employees are herded from the finger stick station to the blood pressure station to the Body Mass Index station to the counseling station and out the door. The resulting clinic can be chaotic and noisy, with limited opportunity to impart the *Teachable Moment*.

However, in the “single-station” model, the employee meets one-on-one with a medical professional at one station for approximately 15 minutes. The medical professional delivers all screening tests, with coaching throughout the entire session. Not only does this time together generate a rapport and high employee satisfaction, but there is ample opportunity to encourage the employee to participate in other facets of your wellness program or those of your health plan. It also significantly reduces the risk that one’s test results can be seen or overheard by others waiting in line.

Scheduling Appointments. Perhaps the biggest employee complaint is waiting in line. Lines waste time and lower productivity, and the extra people milling about make it more challenging to maintain confidentiality at the screening clinic. The simple solution is to offer a variety of scheduling or appointment options to the participants, including online, hard-copy and telephonic systems. Make sure your vendor has a secure, Internet-based appointment system so employees can choose a time that works best for them. Find out if the online appointment system is owned by the vendor or is simply a leased third party application. If the system is a third party application, make sure the system has the flexibility to meet your business requirements, including adding or removing screening stations, sending automated email reminders, and integrating a “single sign-on” for your existing employee portal.

Remote and Individual Screenings. Can’t make the on-site screening event? It’s no problem if your vendor offers an integrated suite of convenient

alternatives, such as a self-administered home test kit, a screening at home, or access to a blood draw service center. Confirm that your vendor fully manages its solutions, and doesn't simply refer or subcontract out to other firms.

Counseling/Coaching:

CASE STUDY: During a health screening, an employee was curtly told he was "too fat and had to lose weight." The employee was so embarrassed on how the message was delivered that he left the screening and submitted a complaint to Human Resources.

The more information and support people receive about their health, the more accountable and active they can be in making the right lifestyle decisions. We also know it is important for people to understand their screening results and how they can improve their numbers. Personal coaching should be considered a standard component of screening, not an optional or add-on service.

Ask to see samples of the takeaway handouts the employee receives at the clinic and the coaching script the staff will be using at the health screening. All handout materials should be interesting, informative, and professionally printed, with space where the medical professional can record the test results. The coaching session should address the following components:

1. Review of results
2. Comparison to national guidelines
3. Suggested lifestyle changes
4. Answers to questions posed by employees

Data Integration and Claims Processing:

CASE STUDY: A company selected a health screening vendor to kick off the new employee wellness initiative. The screening vendor agreed to send electronic results in a timely manner to the company's Health Risk Assessment (HRA) vendor to incorporate the biometric results with the employees' HRA. After spending 4 weeks manually keying in the data, the health screening vendor sent the data in an Excel spreadsheet as an unsecured email attachment that could have been intercepted. The data entry delay pushed back the completion of the wellness program by a month.

Data Feeds. Can your vendor securely integrate the biometric data collected from health screenings and immunization clinics with health plan data and other wellness programming vendors such as health risk assessments, disease

management and incentive management organizations? This takes Information Technology (I/T) support and infrastructure that many smaller and regional screening vendors do not have.

Claims. Your company may not have operating budgets specifically allocated for immunizations and health screenings, but instead prefers to pay for these services through claims. Can your vendor process claims? Claims submission also requires expertise and I/T support that a limited number of screening vendors possess.

About Summit Health

Founded in 1999, Summit Health is now the nation's highest-rated provider of on-site wellness programs, including health screenings, immunizations, coaching, and educational seminars. This focus on quality of service has earned Summit Health customers who include all the leading health plans and over 80 Fortune 500 companies. Summit Health supports companies of all sizes, in every zip code. Summit Health differentiates itself through excellence in

1. Program Management
2. Nationwide Network
3. Participant Experience
4. Regulatory Compliance
5. Quality and Accuracy of Screening
6. Data Collection, Analysis, and Reporting
7. Simplified Pricing
8. Health Claims Processing

For more information go to www.summithealth.com.

About the author: Richard Penington, President, CEO and founder of Summit Health, the nation's largest provider of on-site wellness services for employers, speaks out on the serious risks employers assume when they select on-site wellness providers. For over a decade, Richard has led the on-site wellness industry with the development of novel approaches for efficient delivery, quality, flawless customer experience, simplified pricing, and data integration — all hallmarks of Summit Health. In this special report, Richard reports on the status of the on-site wellness industry and provides practical guidelines for selecting a vendor for on-site services. Mr. Penington earned BS and MS degrees in engineering from Purdue University and an MBA from the Harvard Business School.



The more information and support people receive about their health, the more accountable and engaged they can be in making the right lifestyle decisions.



Appendix: Questions to ask Prospective On-site Wellness Vendors

Below are select questions that should be asked of an on-site wellness vendor:

Are You Legal?

- What is your Federal CLIA ID Number?
- For the states and counties where you will be conducting health screenings, are there specific requirements on the licensure, certification, and training required? If so, outline the requirements by state/county and describe how you meet these requirements. Please provide a copy of licenses for the states and counties where you will be providing health screenings.
- Have you ever been audited by a federal, state, or county regulatory agency? If so, what was the result?
- Provide an overview of your Medical Advisory Board, including duties and biographies of members.
- Do you have a Medical Director in the states where you will be providing health screenings? Provide the biography of the Medical Director, any contractual information, and the standing order.

Are You Secure?

- Describe how you handle health data at the site, transmit it to your main office, process the data, and transmit to any third parties in a compliant manner.
- How do you store your paper and electronic health records? How do you ensure the forms and data are secure? Is the server hosted in a SAS 70 type II facility? If so, provide a certificate or opinion letter.
- Has your staff signed an agreement to keep HIPAA information confidential? Please provide a copy of the agreement.
- How do you maintain confidentiality during health screenings?
- Do handouts containing protected health data have the employee's name identified?
- Have you ever had a HIPAA compliance issue? If so, please explain.

Is Your Staff Qualified?

- Do you staff with W-2 employees, 1099 contractors or agency contractors? How many of each type?
- Do you run background checks on your staff? May I see copies?

- Please provide credentials and licenses for all the staff participating in our on-site event.
- What kind of training has the staff received? Has the staff been certified and this certification validated? Please provide a copy of the training manual and video, as well as a log of staff training history and continuing education.
- What is your professional code of conduct, including dress code? Please provide a copy of your professional code of conduct. Does all the staff sign the code of conduct?

Are You Insured?

- What types of insurance do you have, and what is the coverage amount (each occurrence and aggregate) for:
 - a. General & Professional
 - b. Non-Owned Automotive
 - c. Worker's Compensation
 - d. Damage to premises and sexual or physical abuse
 - e. Privacy, Network, and Media Liability
 - f. Excess/Umbrella Liability
- Provide a copy of your certificate of insurance. Will you name our company on the insurance certificate?
- What is the AM Best rating of the insurance organization?
- Have you ever been subject to a lawsuit? If so, please explain.

Other Points to Consider

Pricing

- Are all fees and services priced as an all-inclusive flat rate per participant?
- Are there additional fees for staff labor, program management, travel, shipping of supplies, or other "hourly" fees?
- What are your minimum participation requirements?
- Are marketing and promotional materials an additional cost?
- What is the minimum guaranteed participation, and what is my responsibility if actual participation falls short of the estimated participation?

Account Management

- Will our company have a single point of contact for the program coordination? If so, please provide a biography of this individual.

- Will this person provide assistance in organizing the wellness event, sending out marketing promotional materials, and handling details for setting up the rooms where the wellness event will occur?
- Will you be able to reach this person after hours and on weekends to handle emergencies?
- Outline the responsibilities of our company for the program.

Participant Experience

- Are participants required to visit multiple stations to complete their screenings? Or, do they interact with a single staffer at a single station?
- How do you offer a telephonic and secure on-line appointment system? If online, do you own the application?
- Do you offer both fingerstick and venipuncture? And flu shots?
- What alternatives do you have for remote employees and those who miss the screening?
- Do you provide customized Scantron forms (bubble sheets) that collect personal and biometric data on each individual? Do you offer a barcode option so employees do not need to waste time completing the informed consent form?

Counseling/Coaching

- Is results coaching a part of the screening, or is it an option that an employee can choose if they are interested? Will there be an additional charge for coaching?
- Provide a copy of the coaching script used by the staff.
- Describe the credentials and education background of your on-site coaches. Are the coaches your own staff or provided by a third party nursing agency?
- How will you train your screeners to discuss the wellness program options we make available to our employees?
- Describe how employees get a copy of their results and the national guidelines for each value. Please provide a copy of the handouts that will be given to the employees.

Integration

- How do you integrate in a secure manner with our other health management partner companies?
- Describe how you submit claims electronically with defined CPT codes to insurance companies.
- How do you match participants against an eligibility file and securely feed biometric data electronically?

Quality of Data/Results

- How do you ensure the accuracy and validity of the data you collect and report?
- Describe your quality control procedures on your equipment. How do you keep records on each machine, lot numbers and expiration dates of testing supplies and reagents, and quality control ranges?
- How frequently do you participate in proficiency testing of your screening staff and machines with an independent testing laboratory?
- What were your proficiency scores from the latest test?
- How many health screening machines do you own, and what is the average age?
- Do you validate that machines are working properly prior to shipment to each event?
- Do you send extra machines to an event in case one malfunctions? If so, how many?