

Reviewer: _____ Employee: _____ Date: _____

Circle One: Pass or Fail

Station Set-Up	
	Organize station (conducive to workflow and privacy)
	Calibrate CardioChek® machine
	Calibrate scale
Greeting	
	Smile
	Friendly
	Proper introduction
Review Screening Process and Documents	
	Explain the overall process
	<ul style="list-style-type: none"> Ask the participant if they have previously participated in a screening Provide a brief explanation of what to expect (ex: fingerstick, body measurements, results)
	Review the consent form, showing the participant each item
	<ul style="list-style-type: none"> Confirm the participant has no history of dizziness, no pacemaker, or possibility of pregnancy
	Participant initials any changes on the form
	Understands privacy policy and can explain in detail
	<ul style="list-style-type: none"> Ensures personal information is not shared with employer, but can be shared with insurance By selecting "no," the participant may not be eligible for company incentives
	Confirm signature and date
Blood Pressure	
	Ask participant to relax arm and sit comfortably
	Do not talk to participant during measurement; prepare for next step or fill out paperwork
	<ul style="list-style-type: none"> Fill out paperwork, prepare finger stick supplies (if not already done), insert strips
	Feet flat on the floor
	Proper cuff size selected
	Protocol for repeating measurement
	Manual pressure if needed
	Ask the participant if BP reading is comparable to their normal
Fingerstick	
	Ask which finger to use, recommend non-dominant hand
	Warm hands and confirm before proceeding
	Alcohol swab and allow to dry
	Stick finger on the fatty side
	Glucose
	Set machine out of the way where it can be stationary for the remaining portion of screening
	<ul style="list-style-type: none"> Do not move the machine once sample has been placed on the test strip
	Wipe finger with gauze
	Collect sample with capillary tube
	Use proper technique, pressure above the first joint, perpendicular to the tip of the finger
	Proper disposal of waste
	Proper gloving and ungloving to maximize provider protection

Notes:

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Weight	
<input type="checkbox"/>	Scale calibrated; recalibrate if necessary
<input type="checkbox"/>	Make sure weight is in lbs.
<input type="checkbox"/>	Offer for participant to remove shoes
<input type="checkbox"/>	Disclaimer about the weight of clothing
<input type="checkbox"/>	<ul style="list-style-type: none"> Ask participant if their weight is comparable to what they normally weigh
Waist and Hip Circumference	
<input type="checkbox"/>	Proper placement for waist measurement is at the navel to the side of the patient
<input type="checkbox"/>	Proper placement for hip measurement is a little below the belt line to the side of the patient
<input type="checkbox"/>	Spin technique
Body Fat Analyzer	
<input type="checkbox"/>	Ask if participant has ever used a body fat analyzer
<input type="checkbox"/>	Be able to provide a general explanation of how it works, if asked
<input type="checkbox"/>	Know common errors and how to report on intake form
General Workstation Area	
<input type="checkbox"/>	Clean-up work area before going over the results with the participant
Review Results	
<input type="checkbox"/>	Proper review of results; proper level of detail based on participants questions and interest level
<input type="checkbox"/>	Professional grammar and proper pronunciation of biometric information
<input type="checkbox"/>	High engagement, small talk (weather, job activities, busy day, etc.), lots of please and thank you
<input type="checkbox"/>	Accurately completed all paperwork
<input type="checkbox"/>	Signs and dates the Triad Care form
<input type="checkbox"/>	Time to complete the screening process: _____
Understands General Responsibilities	
<input type="checkbox"/>	Setting up and taking down screening station
<input type="checkbox"/>	Able to setup and take down privacy screens
<input type="checkbox"/>	Responsible for all items in the box and proper return to Triad Care
<input type="checkbox"/>	Arrive on time to the event
<input type="checkbox"/>	Professional attire
<input type="checkbox"/>	Participate as a team member

Notes: