



*Overview of Services*

**2016**



## **US Wellness**

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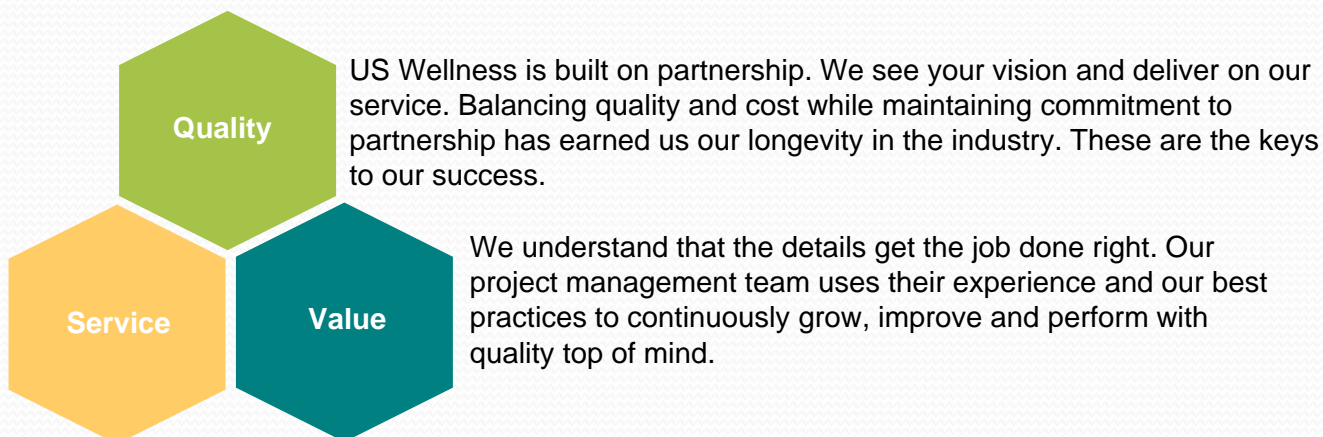
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## US WELLNESS – OUR APPROACH

At US Wellness, our approach to service is based on partnership and commitment to our client relationships. Our owner/operator management and our strategic goals allow us to focus simply on delivering great work.

US Wellness has delivered on this approach in our work with clients for the past nineteen years. Our approach to our clients' needs is to focus on our core principles: **QUALITY, SERVICE AND VALUE**. US Wellness has built and grown its business on these building blocks. It is this experience and commitment that we bring to our clients nationwide.



US Wellness takes a fully integrated approach to our client's needs – creating, communicating and executing wellness programs that are tailored to the needs of the population. For nearly 20 years, US Wellness has been delivering high-quality wellness services to our clients and end users, including:

- Wellness program strategy and compliance
- Employee health management and engagement (online and site visit)
- Onsite and offsite biometric health screenings and health counseling on results
- Electronic data capture

US Wellness is committed to continuous quality improvement. In the past year alone, US Wellness has enhanced its operations and client service to include:

- Data security systems to achieve the highest standard in data encryption and HIPAA compliance – US Wellness data security has been audited and approved by numerous client reviews, including Walgreens Information Technology 3rd Party Audit Review
- 508 Compliance – US Wellness' health portal platform is compliant with the Rehabilitation Act Section 508, supporting services for persons with disabilities
- Electronic data capture – US Wellness' 10-year history providing electronic data capture at large onsite biometric events recently expanded to all events nationwide

## OUR GOOD WORK

US Wellness has a high retention rate for both our clients and our team members. The average client retention rate is over 5 years. Our success stories include:

**Anheuser-Busch** - With over 50 locations and over 20,000 labor union and non-labor union employees and spouses across the United States, Anheuser-Busch needed a wellness program partner that could offer a seamless service to its diverse and national employee population. Anheuser-Busch is committed to improving employee health and to representing wellness goals that influence health care cost containment.

US Wellness has served Anheuser-Busch for five years, offering both onsite and offsite biometric screening and support in incentive campaign management. US Wellness manages over 15,000 physician forms and Alternative Reasonable Standard submissions from Anheuser-Busch employees/spouses annually. Anheuser-Busch has lowered health risks among its benefits population and has contained rising health care costs through health improvement. Data analysis of annual screening outcomes shows progress toward benefit cost management.



**Scott's Miracle Gro** - Scott's has been an innovator of population health for over a decade and uses an incentives-based screening model of wellness. Employees participate in onsite and offsite screening, education and risk factor analysis performed by US Wellness. US Wellness manages over 5,000 physician forms and Alternative Reasonable Standard submissions from Scott's employees/spouses annually. Three-tiered outcomes based on screening results is reported to Scott's, its broker and its payroll vendor. Scott's Miracle Gro has lowered health risks and managed its health costs. Scott's CEO enjoys a 73% employee approval rating, partially in return for creating a healthy work environment.

Additional happy clients include employers both large and small at various stages of wellness program innovation. US Wellness supports our clients with custom programs that are designed to evolve along with improvement in employee population health and a changing regulatory landscape. Examples of other clients include:





## Biometric Screenings

US Wellness has focused its core service on the delivery of biometric screenings since 1997. By the end of 2015, US Wellness will have performed over 10 million onsite and offsite screenings.

What makes us different? .....US Wellness OPERATES the laboratory and directly manages the screening team. Unlike other wellness providers, US Wellness is the direct manager, operator and licenser of the screening services. This means that we control the quality.

Our biometric screening services are designed to facilitate the development of organizational wellness programs as a valid construct to building awareness and providing baseline data. Toward this end, US Wellness is committed to advancing the development of best practices by ensuring:

- Measures are clinically valid and evidence-based, shown to be associated with chronic illness
- Measures are consistent and will enable comparative analysis and benchmarking
- Data collection occurs at consistent intervals to measure the impact of programmatic activities
- Data is standardized, allowing for the analysis of whole populations as well as subgroups
- Data is actionable, counseling at the time of screening is clear and concise

## Program Management

US Wellness has developed a program launch process that allows us to manage to program objectives, process integration and satisfaction measures. This process begins with extensive communication and training, team expectations and program milestones. Successful screening services are reliant on logistics management; therefore, process integration tools are in place to ensure program consistency across all screening venues. Process integration tools include: 3x staff confirmations, interactive staff training and successful completion of training tests, 2x supply-chain cross check on event supplies and equipment needs, early shipment of supplies and equipment and rigid proficiency testing on equipment used for health screenings. Included in our service are:

- Communications and coordination with venue contacts on event details
- Participation projections based on past performance, incentives
- Venue layout and participant flow
- Promotional materials development and support
- Customized online screening appointment scheduling tool

## Online Scheduling

US Wellness offers a customizable online scheduling and appointment management tool. Pre-registration for screening will help further ensure timely throughput with minimal wait time. See a live demo at

<http://sample.myscreeningappointment.com/>

**Airmodo Health Screening Options**

To help you achieve and maintain good health, Airmodo is providing you and your spouse with various health and wellness opportunities. Airmodo team members and spouses who are covered by the Airmodo medical insurance plan could earn a discount on 2016 medical premiums by completing a health screening by **December 31, 2015**.

To complete your health screening, please select from the options below.

|                                                                                                                                                                                                                            |                                                                                                                                                                                                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>On-site Health Screening</b><br>On-site health screenings will be held in December 2015. To view the on-site screening schedule and to schedule your appointment, click on the box below.<br><a href="#">CLICK HERE</a> | <b>Request a Voucher</b><br>You may have your health screening done at a participating LabCorp facility before <b>December 31, 2016</b> . To request a laboratory voucher, click on the box below.<br><a href="#">CLICK HERE</a> | <b>Physician Form</b><br>If you visited your doctor between January 1, 2015 and <b>December 31, 2015</b> , and you had required tests performed, your doctor can complete a form in lieu of you participating in a screening. Required tests include: height, weight, blood pressure, total cholesterol, HDL, cholesterol, and blood glucose. Waist circumference is not required, but preferred. To print the physician form, click on the box below.<br><a href="#">CLICK HERE</a> |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|



## **Regulatory Due Diligence – National Reach in Every US State**

US Wellness directly manages our CLIA licensure, required to perform laboratory services (those related to cholesterol, glucose and other screenings, using a finger stick method, that use blood specimens for analysis). US Wellness also carries individual State laboratory licenses in those states with such a requirement. In addition to State licensure, US Wellness is accredited by COLA, a national laboratory accreditation organization. Accreditation is awarded only to laboratories that apply rigid standards of quality in day-to-day operations, demonstrate continued accuracy in the performance of proficiency testing, and pass a rigorous on-site laboratory survey. Venipuncture testing is also offered, where preferred.

## **Our Field Teams (Screeners)**

Unlike others in the industry, US Wellness does not subcontract its services. US Wellness maintains a proprietary network of licensed health care professionals that are trained on quality and specific client needs. All US Wellness staff undergo bi-annual performance reviews, which measure ongoing qualifications. USW screening teams consist of health care professionals which include:

- Registered Nurse (RN)
- Licensed Practicing Nurses (LPN)
- Registered Respiratory Therapists (RRT)
- Nurse Practitioners
- Registered Dietitians

All USW staff are required to participate in a training on:

- Client mission and goals
- HIPAA Privacy and Security
- Biohazard disposal/OSHA
- Emergency medical protocol
- Review of screening equipment and supplies
- Event logistics and expectations, team roles

USW performs training with every provider for every event. Experienced providers are offered brief refreshers on USW protocol with more extensive training on client goals, event logistics and event specific needs. Prior to working with US Wellness as a health screener, new providers must complete an in-depth training which involves completion of training videos, interactive training with a US Wellness' clinical trainer and must shadow an experienced screener at a live screening event.

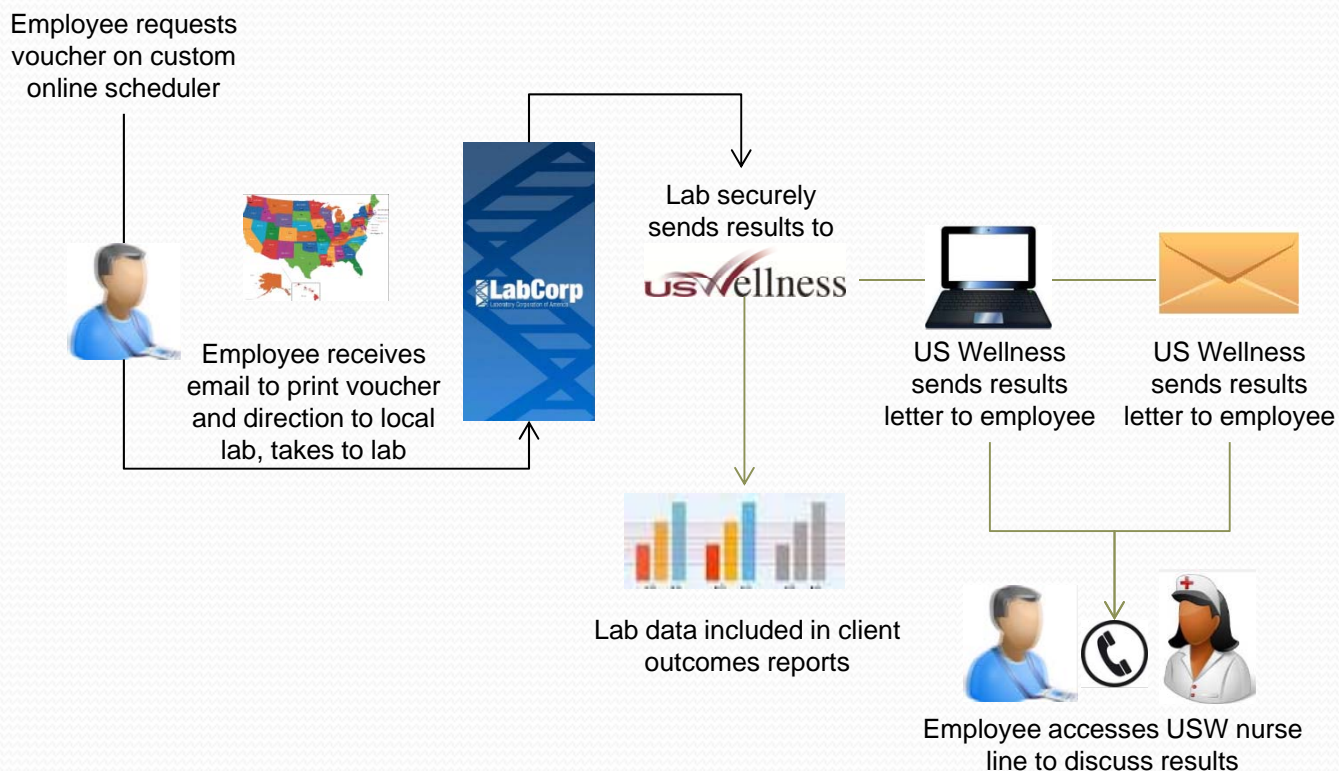


### Laboratory Voucher (Offsite Screening Option)

US Wellness lab voucher offsite screening option offers access to over 1,500 LabCorp blood draw centers, where US Wellness screening vouchers can be redeemed. Vouchers are requested via the online scheduler (sample provided on page 6 herein) and delivered to the user's email. Users take their printed voucher and picture ID to any of LabCorp's participating locations where total cholesterol, HDL-cholesterol, LDL-Cholesterol, triglycerides, glucose, blood pressure, height, weight, body mass index and waist circumference are performed. Additional tests, such as PSA and HbA1c may be ordered based on project need.

The screening outcomes are securely delivered to US Wellness by our laboratory partners. Users receive their results online (if employer subscribes to US Wellness' health portal) or by mail (if employer does not subscribe to US Wellness' health portal.) Both online and letters with results offer the user an understanding of their lab results compared to normal ranges, nutrition and activity recommendations and how to access the US Wellness health coaching team with any questions about results or next steps. The diagram below represents US Wellness lab voucher service delivery:

#### US Wellness Lab Voucher Process





## Physician Data Collection (Offsite Option)

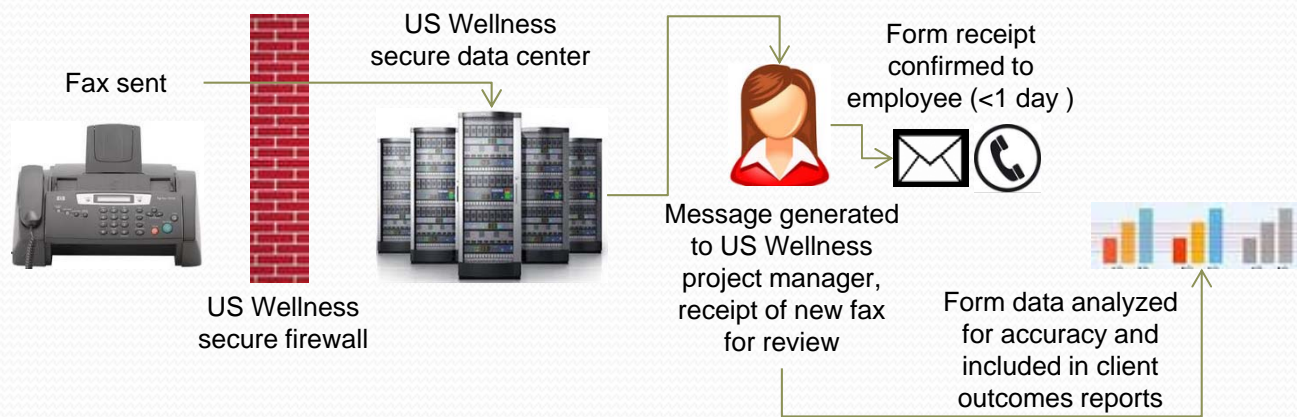
US Wellness manages over 100,000 physician forms annually. Coupled with onsite biometrics, the use of the PCP form helps to save clients money and improve satisfaction among employees. PCP forms are customized by client and include a client-specific secure fax line.

## Physician Form Process and Security

US Wellness manages the entire physician form process, from development and delivery to collection and reporting. Each client has a dedicated fax line that receives PCP forms to US Wellness' encrypted fax server. This secure system manages up to 16 simultaneous fax sessions with the ability to store up to 1,500 faxes at a time to ensure faxes are received and accounted for at any one time. Upon receipt of a faxed form, US Wellness' account management team reviews the forms for accuracy and completion and then a confirmation is sent to the employee. Confirmations are made by email, phone or text, based on employee's preference. All incoming faxes/forms are saved and stored within US Wellness' HIPAA compliant secure data center.

Data provided on physician forms is collected into a data report. All data used for reporting is processed through US Wellness data checking model. This model reviews data outliers, inconsistencies and calculated values to ensure accurate processing. US Wellness works with clients to receive regular eligibility files, which are used to match forms received to employee information. This process allows for 100% match accuracy to each employee's first name, last name, date of birth and employee ID (where applicable). This final step in data quality assurance is key to the successful delivery of participation and aggregate report.

### US Wellness PCP Form Process and Security

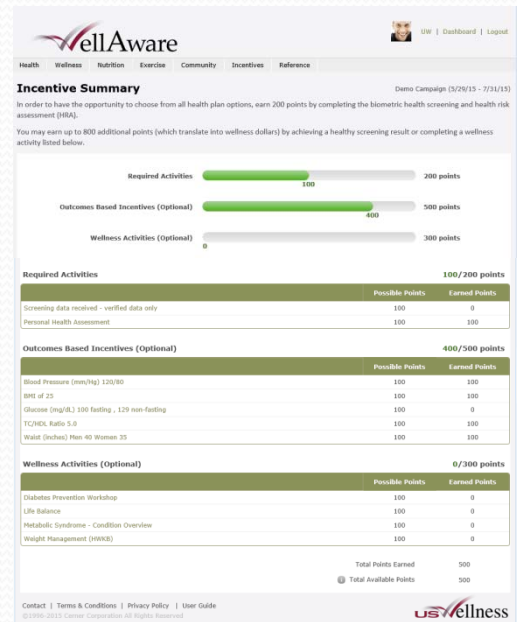


## Incentive Tracking and Administration

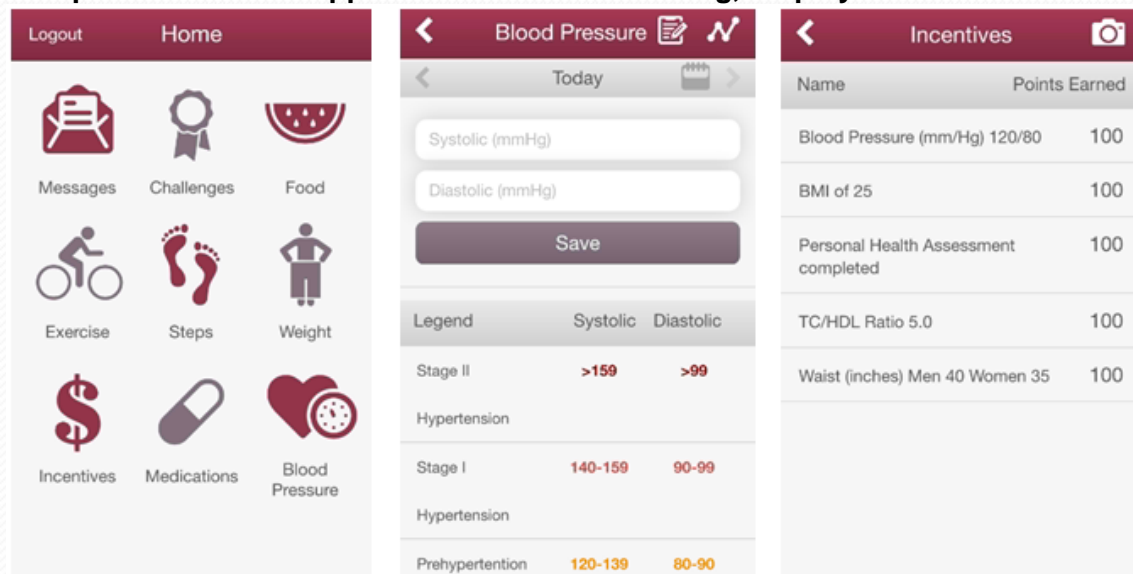
US Wellness offers numerous tools and services to support annual participation-based AND health-contingent incentive management. US Wellness currently provides incentive management tracking for more than 125,000 eligible employees nationwide for incentive programs spanning from participation and activity based to complex health-contingent and activity based for employees, spouses and retirees. Services including:

- **Fully customizable incentive programming !**
- Strategy and communication planning
- Affordable Care Act (ACA) compliance review by US Wellness team of ACA-certified experts
- Receipt of employee submission of incentive-related activities
- Online and Mobile APP (IOS and Windows) employee incentive tracking tools updated daily
- Payroll reports/uploads on applicable incentive outcomes
- Client reports on incentive outcomes

## Sample View: Online Incentive Tracking, Employee/User View



## Sample View: Mobile Application Incentive Tracking, Employee/User View





## Health Coaching

US Wellness' health coaching services are designed to support ongoing health improvement, typically aligned with health risks identified during an initial health risk assessment or biometric screening , and are available ONLINE, TELEPHONICALLY or ON-SITE.

US Wellness' coaching program is a positive reinforcement of healthy eating, exercise and lifestyle management tools. This approach has successfully been in use by US Wellness for over 15 years. Each participant in the coaching program is assigned to a health coach that will follow them throughout the program. Coaching begins with an initial health assessment and goal setting session between the participant and the health coach. Key components of the health coaching program include:

- Initial health history/assessment and goal setting session
- Monthly outreach by coach – one hour coaching discussion per month
- Ongoing availability of health coach for Q&A support

US Wellness coaching offers a single source to participants. Each participant works with one coach. The program is uniquely customized to affect true risk identification and behavior change. Through this one-on-one relationship, individuals receive guidance in setting goals and designing a personal plan of action and ongoing coaching and support/motivation as often as they need it.

## Staffing Qualifications / Experience

- Minimum of a Bachelor's degree in health, fitness or other related fields
- Three years' health/fitness experience (e.g., personal trainer, health educator, health coach)
- In addition to the qualifications and certifications necessary to become a US Wellness Coach, required attitudes and skills include:
  - Believes in a person's ability to make change
  - Has a learning/personal-development orientation
  - Is able to work collaboratively with different personalities in problem-solving and setting behavior change goals
  - Uses active listening skills in working with participants
  - Effectively organizes information and develops appropriate plans of action
  - Demonstrates high relationship-development skills; is able to generate trust, hope and optimism in others



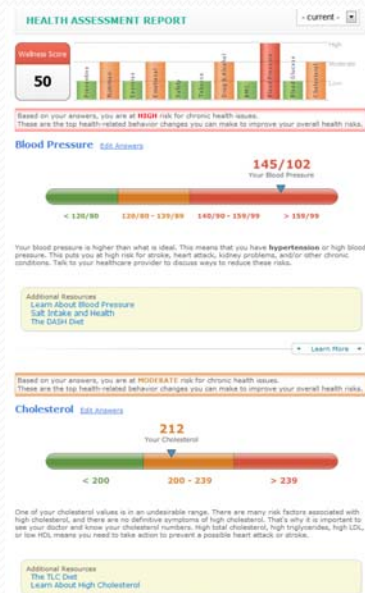
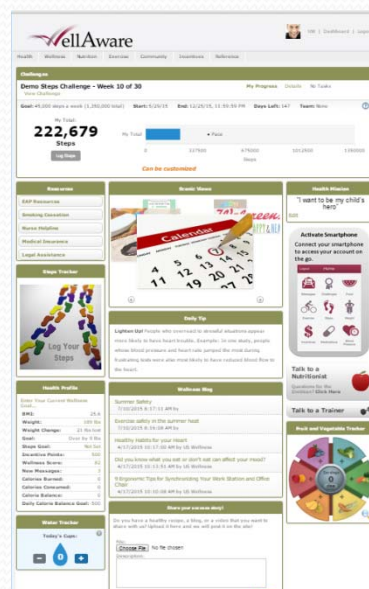
## Wellness Web Portal

US Wellness health portal automates and integrates all aspects of delivering and measuring health & wellness initiatives for population health programs. Based on the Cerner Wellness platform, US Wellness differentiates this service by:

- **FULL-SERVICE** rapid response and administration management – Our account teams are technical and project managers. We **KNOW** our portal and manage all of the details for our clients. Compared to other portal managers, we respond quickly with knowledgeable technical expertise and take the responsibility to make all changes and updates to the portal!
- **FULL CUSTOMIZATION** – Clients have the option to use US Wellness' existing "WellAware" platform, or we will design a custom program
- **508 Compliant** to support accessibility to people with disabilities
- **Challenges** – Three annual challenges are administered annually as part of the US Wellness Service package
- **Diet and exercise tools** including upgrade menu planning and "Talk to a Nutritionist" and "Talk to an Fitness Expert"
- **Behavioral change programs** including US Wellness' proprietary "Health Improvement Program (HIP) workshop, designed to address next steps following biometric screening
- **Incentives and reward management and tracking** (fully customizable)
- **Online, telephonic and onsite health coaching**
- **Monthly newsletter**

**NCQA certified** Health Assessment (HA), Self Care, Encouraging Wellness and Prevention - Extends HA experience to deliver behavioral change and content to members, supports queuing of programs/workshops based on member needs and risks

### Sample View: Login screen, user landing page dashboard and user HRA summary report





## Wellness Challenges

Three annual challenges are administered annually as part of the US Wellness service package. Wellness challenge programming is customized by client to address the engagement and health needs of the population. US Wellness most popular wellness challenges, include:

- “StepTacular” - Walking program - Individuals track their steps (using a step counter) or minutes (dedicated walking minutes), aiming for 6000-10,000 steps or 30-60 minutes a day. Fitbit integrated!



- Healthy Eating Challenge – Talk to a nutrition expert to kick off the program, then log your food intake for one week. US Wellness will show you how your calories and nutrients that week stack up against healthy goals and will make recommendations on small changes that will make a big difference for you!
- Health Improvement Program (HIP) – HIP is a 12-week custom workshop designed to review post-biometric screening needs related to nutrition, activity and lifestyle goals

In addition to custom wellness challenges that are fully administered by US Wellness, a wide variety of workshops are accessible by users at any time. Workshops include:

- Alcohol Abuse and Addiction Management
- Anxiety Management
- Arthritis
- Asthma
- Cardiovascular Disease
- COPD
- Depression
- Diabetes Prevention
- Drug Abuse Education and Management
- Exercise
- Financial Wellness
- Headaches
- Healthy Aging
- Heart Failure
- Heartburn
- High Cholesterol
- Hypertension Workshop
- Introduction to Stress Management
- Job Stress
- Life Balance
- Managing Allergies
- Migraine Headaches
- Nutrition Workshop
- Osteoporosis
- Personal Goal Setting
- Personality and Stress
- Prepare for flu season
- Preventive Health
- Reasonable Alternative
- Smoking Cessation
- Social Stress
- Tension Headache
- Understanding Back Pain
- Walking Workshop
- Weight Management Workshop

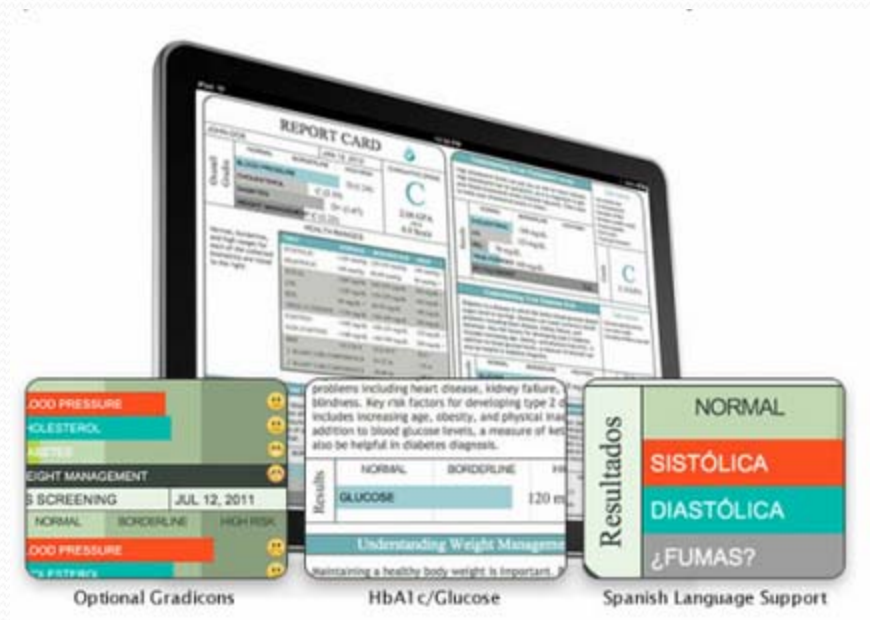
## Electronic Data Capture

US Wellness was the first screening company to offer electronic data capture in 2005 and has offered progressively advanced systems for the past nine years. US Wellness' proprietary system is in use today by Walgreens on the Way to Well Tour and is used by other organizations seeking efficient data collection and reporting.

Electronic Data Capture (EDC) allows for sophisticated service and enhanced data security compared to using paper forms. While US Wellness supports our own proprietary Local Area Network system and our cloud-based secure APP, other platforms are also supported and can be integrated into US Wellness' screening service and data delivery.

US Wellness' EDC system offers:

- Load of eligibility file and appointments for eligibility verification at events
- Next day data upload into US Wellness health portal (no fee uploads!)
- Access to past year's results for discussion with the employee at the time of screening
- English/Spanish language
- Email report to employee, as approved
- Report card comparison of past two years of outcomes





## **Employee Engagement- Reducing Risk Through Behavior Change**

US Wellness' methodology for employee engagement in health has been proven to achieve significant change in health outcomes by facilitating small action steps. This philosophy includes:

- Providing rapid response service to employee and client needs and questions
- Involving the organization and the individual
- Setting actionable goals
- Addressing the need for both specific direction and personal motivation to influence change
- Creating a culture of change and acceptance
- Providing the tools necessary for the organization and the individual to take action
- Measuring actions and results

Engagement begins at the onsite screening for most. Employees have the opportunity to engage one-on-one with a health screener. US Wellness' health screeners will provide each participant with a brief overview of how their own results compare to normal ranges and what diet and exercise activities can help them improve or maintain health. High risk screenings are referred to a health coach for follow-up, where coaching is applied. Medical emergencies are managed according to US Wellness Standard Operating Procedure for Medical Emergencies by US Wellness Medical Director.

### **ONLINE EMPLOYEE ENGAGEMENT**

Online users of US Wellness' health portal are engaged through:

- Outreach messages from health coaches
- Weekly/monthly newsletters
- Incentive/Rewards communications and confirmations
- Workshops that track engagement compared to expected completion time
- Invitations to 3-annual Wellness Challenges
- Other push/custom messaging
- Daily Tips
- Connection to mobile devices and FitBit devices

### **LIVE EMPLOYEE ENGAGEMENT**

In addition to online and screening engagement, US Wellness offers the following engagement boosters:

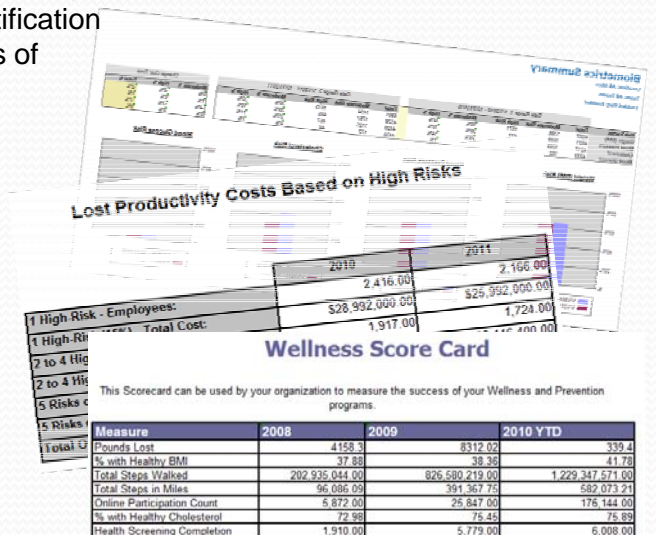
- Welcome packet
- Participation in open enrollment presentations and meetings
- Onsite nutrition counseling seminars and one-on-one meetings
- Onsite fitness/activity counseling seminars and one-on-one meetings
- Onsite health fair services
- Onsite yoga classes
- Home mailers, as applicable

**CONNECTED=  
ENGAGED**

## Reporting and ROI

US Wellness has a proven track record for customized outcomes reporting to our clients and their brokers/agents. Standard monthly reports that will be provided include, at minimum:

- Biometric screening outcomes report and risk stratification
- Cohort screening outcomes report among all years of consecutive data
- Participant tracking report, showing count of participants that have improved risk factors, reduced risk of metabolic syndrome and moved from high or moderate risk to low risk
- Outreach and coaching interactions (counts)
- Outreach and coaching interactions by “willingness to change”
- Outreach and coaching interactions by risk stratification
- Incentive tracking
- Portal login and tools usage
- Workshop completion
- Wellness workshop enrollment and completion
- Communication/messaging completed by US Wellness to encourage engagement
- Customer Satisfaction Surveys



## ROI Assessment

A 2010 review by a Harvard economist stated that wellness programs returned three dollars in health-care savings and three dollars in reduced absenteeism costs for every dollar invested. Still, some organizations are challenged to quantify that with their own wellness programs. Another similar study published in Fortune found that cost savings with a wellness program averaged \$30 PMPM.

Most direct and short term (5 years or less) cost savings that organizations realize in wellness is a direct response to disease management programs because those employees with chronic disease have the highest costs incurred to the employer. Any change to this groups use of benefits results in a more immediate cost savings. US Wellness works with high risk individuals in our risk stratification coaching and also employs all of our client's existing benefits options through health plan services to ensure an integrated approach to disease management that takes advantage of services already being offered by the health plan.

Real long term ROI in preventive wellness can be realized in increased productivity, employee retention, lowered absenteeism and competitive advantage. Lifestyle management, education, awareness and long term prevention support these enterprise wellness goals.



## WELLNESS AUDIT

In addition to the population health risk assessment, US Wellness employs our proprietary Wellness Audit to help clients realize their overall position among leading wellness benchmarks.

The Wellness Audit Framework was developed based on industry trends and focus group findings among US employers, derived by the following resources:

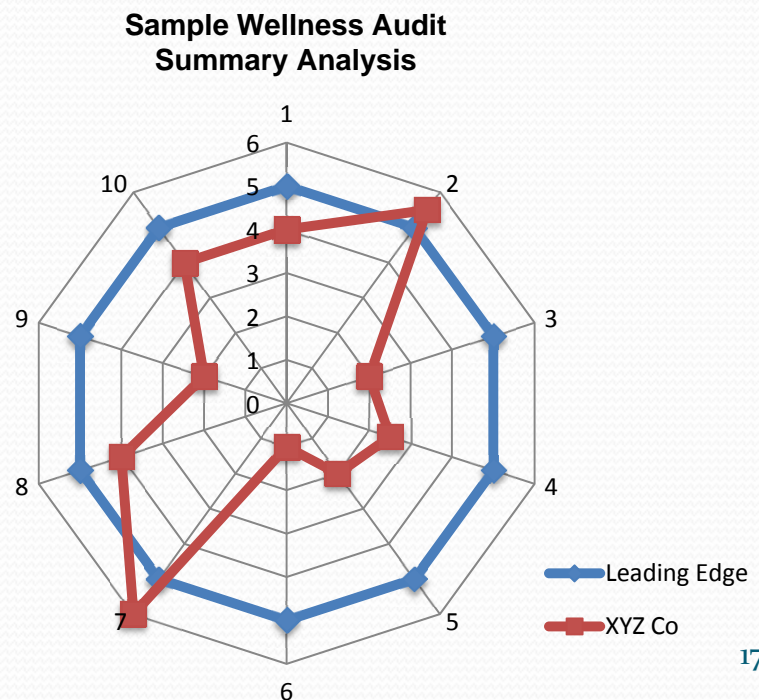
- US Wellness client interaction and service delivery
- Public research and published reports
- Focus groups

The Wellness Audit is designed to support:

- Organizational benchmarking of existing and planned wellness activities
- Progression toward leading industry practices
- Define organizational goals and expected outcomes of wellness
- Strategic opportunities to enhance wellness outcomes and investment

The Wellness Audit includes 10 evaluation categories, including:

- Cultural audit (focus groups/interviews, satisfaction surveys)
- Communications/access/frequency of existing wellness activities
- Leadership involvement in wellness achievement
- Wellness service offerings
- Change in risk status of population
- Corporate policies
- Incentive design and delivery
- Non-traditional offerings
- Outcome evaluation
- Integration of benefits





## WELLNESS SUMMIT

The goal of the Wellness Summit is to change course and get to the next level of results. US Wellness facilitates this by offering clients a comprehensive strategy to set expectations, gain insight, make decisions and improve results. Key activities include:

| Key Activity                                                                                                                                                                               | Responsibility                                  | Timing                                   |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------|------------------------------------------|
| Pre-meeting 1: Meeting planning <ul style="list-style-type: none"> <li>Define goals</li> <li>Invitees</li> <li>Logistics, timing and facilitation</li> </ul>                               | Client<br>US Wellness                           | 8-10 weeks in advance of Wellness Summit |
| Meeting Materials Design <ul style="list-style-type: none"> <li>Meeting Design / branding / look and feel</li> <li>Invitations</li> <li>Pre-reading (chosen in line with goals)</li> </ul> | US Wellness                                     | 6-8 weeks prior                          |
| Meeting Invitations                                                                                                                                                                        | US Wellness design and send on behalf of client | 6 weeks prior                            |
| Meeting Logistics and Coordination <ul style="list-style-type: none"> <li>Meeting Space</li> <li>Food</li> <li>Audio Visual</li> </ul>                                                     | US Wellness<br>Client                           | 4-6 weeks prior                          |
| Pre-Meeting Final Planning <ul style="list-style-type: none"> <li>Goals review, logistics review and final planning</li> </ul>                                                             | Client<br>US Wellness                           | 4 weeks prior                            |
| Wellness Summit (8am – 6pm, dinner optional)                                                                                                                                               | All invited parties                             |                                          |
| Post-summit recap <ul style="list-style-type: none"> <li>Define and review decision points</li> </ul>                                                                                      | Client<br>US Wellness                           | 1 day post                               |
| Final Deliverable <ul style="list-style-type: none"> <li>Packaged deliverable summarizing notes, discussions, outcomes, decision points</li> </ul>                                         | US Wellness                                     | 1 week post                              |

The Wellness Summit results in an identification of needs, roadblocks, opportunities and next steps to be taken by all invited stakeholders. Stakeholders end the summit with a statement of commitment to helping clients identify the goals outlined in the Wellness Summit. US Wellness' deliverables include a Wellness Summit meeting notes take away and other supporting media generated during the summit as well as quarterly management of ongoing stakeholder status updates.