

EXAM ONE

LIFE INSURANCE SCREENING

INSTRUCTIONS

QUESTIONNAIRE

Call to schedule an appointment for a pre-screening exam for a fictitious life insurance application. During the appointment, which will take place at your home or at an Exam One office, evaluate the pre-screening exam process for life insurance applicants. No results of the exam will be provided to you. The exam is just one step in the process. You are not actually applying for life insurance.

Before You Begin

- Confirm your Shopper Hub contact info
- Agree to the project waiver
- Review your shop confirmation
- Know your scenario (background info)
- Call to schedule an appointment

Don't Forget!

- Use the assigned life insurance company
- Provide your birthdate & SSN if asked
- Get the names of the employees
- Ask to see the examiner's ID badge
- Upload any paperwork with your report



General Requirements

- Read all instructions and the entire questionnaire before you complete the shop.
- Check your shop confirmation for the name of the life insurance company to use.
- Confirm your contact information with CX Group is correct in your shopper account.
- Call Mon-Thu during business hours to schedule an exam appointment.
 - Call on the scheduled date found in your shop confirmation to make an appointment.
 - Conduct the exam appointment on the date/time you scheduled over the phone.
- **Project waiver:** Accepting this assignment and scheduling an appointment is your consent to the blood and urine specimen collection and height/weight/blood pressure/pulse measurements and to confirm your understanding of the nature of the assignment.
 - All specimens collected during the exam will be destroyed. No testing will be done, and no results will be provided to you.
 - Your SSN will be requested by the examiner to complete the lab slip, and you must provide it. The paperwork will not be processed.
 - The examiner will be an experienced healthcare professional such as a nurse practitioner, phlebotomist, medical assistant, etc.
- Upload a copy of any paperwork left with you with your report.
- Submit your report to shopperhub.cxgroup.com within 12 hours of completing the shop.
- Retain all documentation for six months following your shop.
- You or your immediate family members cannot have ever worked for Exam One.



Scenario (Background Information)

- Role-play as a person applying for life insurance with the life insurance company found in your shop confirmation.
- You have never smoked.
 - If you are a smoker, make sure you do not smell of tobacco, and do not smoke while the examiner is present for your exam.
- If asked, you do not take any medications (even if you do).
- Use your real name, address, phone number, and birthdate. Provide your SSN and ID when requested.



Shop Instructions

Step #1: Confirm the contact information in your CX Group Shopper Hub account is up to date

- As soon as you are awarded the shop, confirm that your name, address, and primary phone number are correct in your CX Group Shopper Hub account, and if not, make any necessary updates to correct it.
 - Go to 'My Account' and then 'General Profile' to find your information.
- Your contact information will be put into Exam One's scheduling database so that you are able to schedule an appointment.

Step #2: Call to schedule your exam appointment

- Call the phone number listed in your shop confirmation on your scheduled shop date during business hours to schedule the appointment.
 - Do not call before your scheduled shop date because we need time to add you to Exam One's scheduling database.
- Indicate you would like to schedule a life insurance exam as you are applying for life insurance.
 - If asked for which life insurance company, give the name from your shop confirmation.
 - If you are only offered an in-home appointment, you must accept.
 - If an in-office appointment is offered, you may accept and complete the exam at an Exam One office only if the office you are offered matches the location you are assigned to evaluate (check your shop confirmation).
- Accept an appointment date within 7 days, if offered.
 - If the appointment date is more than 7 days out, ask if you can be seen within the next week as you'd like to move the process along with the insurance company.
- Get the name of the person who schedules the appointment. Ask for their name if not provided.
- If you get voicemail, leave a message with your name, phone number, and reason for calling.
 - Wait 1 full business day (24 hours) for a return call.
 - If you do not get a call back by the next business day, call again during allowed call hours and leave your contact information again.

- Wait 1 more full business day (24 hours) for a return call.
- If you do not get a call back after the second attempt, notify your scheduler.
- After scheduling the appointment, notify your scheduler of the date/time of the appointment.

Step #3: Conduct the life insurance screening with the examiner

- Meet with the examiner on the scheduled date/time.
- **Important!** If your exam takes place in-home, ask to see the examiner's badge when they arrive.
- Get the name of the examiner who conducts the exam. Ask for their name if not provided.
- Allow the examiner to complete a blood/urine collection and take your blood pressure, pulse, and height/weight.
 - The examiner will ask you to submit a urine sample, so be prepared to do so.
 - The examiner should draw your blood (2 small tubes). If you are asked if you fasted, say yes even if you have not. Note if the examiner wears gloves while drawing your blood.
 - The examiner should measure your blood pressure up to 3 times. Remember if this is done on one arm or both.
 - The examiner is required to physically measure your height and weight. If the examiner simply asks for these measurements without actually taking them, make note of this in your report. Do not request that they be measured.
- The examiner should remove all material from your home when they leave, including trash. Note what, if anything, was left behind.



QUESTIONNAIRE

Shop date:

Start time:

End time:

Scheduling the Appointment

1. What life insurance company did you indicate you were applying with?

Atlantic Life

Compass Financial

First Life Insurance Company

Other

2. How was the appointment scheduled?

I scheduled on the first call attempt

I scheduled on the second call attempt

I left a message and received a call back to schedule

3. Did the customer service representative identify themselves by name?

Yes

No

4. Name of the customer service representative you spoke to when scheduling the appointment:

Name is required. Ask for their name if not provided.

5. Were you offered an appointment within 5 business days?

Answer based on the earliest available date you were offered, even if it was not the date you ultimately scheduled. Day 1 is the first business day after the date you called.

Yes

No

6. Were you given the option to go into an office for the exam or have an examiner come to your home?

The customer service representative or electronic scheduling system may offer the option of having you visit an Exam One office or Quest Diagnostics center for the exam.

Yes

No

7. If you scheduled a home appointment, did the customer service representative repeat your address to confirm it?

Yes

No

N/A – appointment was at an Exam One office

8. Did the customer service representative confirm the best phone number to reach you?

Yes

No

9. Did the customer service representative ask if you have any issues with blood draws?

Yes

No

10. Did the customer service representative ask if there were any special instructions for the examiner prior to their arrival?

Yes

No

11. Did the customer service representative ask if you have a kit (tubes and instructions) already?

Yes

No

12. Did the customer service representative explain what to expect at the exam OR provide a website to refer to?

Examples of statements for a Yes response:

- A blood and urine sample will be taken (fast prior to the appointment).
- Your blood pressure, height, weight, and pulse will be taken.
- Questions may be asked about your smoking history and/or medications.
- They may provide you a website to refer to for additional information.

Yes

No

13. If yes, describe what they explained:

14. Did the customer service representative speak to you in a professional and courteous manner?

Yes

No

15. If no, please explain:

16. Did the customer service representative thank you at the end of the call?

Yes

No

17. Did you receive a confirmation call or text to remind you of the scheduled appointment?

Yes

No

Arrival/Greeting

18. Was your appointment rescheduled for a different day and/or time after it was originally scheduled?

Yes, due to the examiner's schedule conflict

No

Yes, due to my schedule conflict

19. If yes due to the examiner's schedule conflict, please explain what you were told:

20. Where did the appointment take place?

In home

Exam One office

21. Name of the examiner who completed the exam:

Name is required. Ask for their name if not provided.

22. Did the examiner arrive at the agreed upon appointment time?

Yes, arrived on time

No, more than 20 minutes late

No, less than 5 minutes late

N/A – appointment was at an Exam One office

No, 5-9 minutes late

No, 10-20 minutes late

23. If the examiner was late, did they call to let you know they would be late?

Yes

N/A

No

24. If the examiner was late, what reason did they provide for being late?

25. Did the examiner introduce themselves by name?

Yes

No

26. Did the examiner show you their Exam One ID badge when requested?

If your exam took place at home, you must request to see the examiner's ID badge when they arrive.

Yes

N/A – appointment was at an Exam One office

No

27. If they did not have a badge, what reason did they provide for not having one?

If your exam took place at home, you must request to see the examiner's ID badge when they arrive. If you answer Other, you must explain the examiner's response in your comments.

Did not have it with them

Other

Have not received their badge yet

N/A

28. Did the examiner offer you a warm and sincere greeting?

Examples of a greeting include but are not limited to: saying, 'Hello' or 'Welcome', asking, 'How are you today?', smiling, making eye contact, etc.

Yes

No

29. Was the examiner wearing scrubs or business casual clothing?

Yes

No

30. If no, what was the examiner wearing?

31. Did the examiner smell of tobacco smoke?

Yes

No

The Exam

32. Did the examiner wear gloves when drawing your blood?

Yes

No

33. Did the examiner physically measure your height with a measuring tape or other tool?

Yes

No, my height was not asked or measured

No, I was verbally asked what my height was

34. Did the examiner physically measure your weight with a scale?

Yes

No, my weight was not asked or measured

No, I was verbally asked what my weight was

35. How many times did the examiner take your blood pressure?

Blood pressure is taken using a machine and is done by wrapping a sleeve around your upper arm.

0

2

1

3

36. If your blood pressure was taken more than once, was it taken on each arm?

Yes

N/A – my blood pressure was taken once or not at all

No

37. Did the examiner take your pulse?

Pulse is taken by placing fingers on the wrist.

Yes No

38. Were you confident with the accuracy of the physical measurements taken by the examiner?

Yes No

39. If no, please explain:

40. Did the examiner have any difficulties with the blood draw, or did you experience any discomfort with the blood draw?

Yes N/A – my blood was not drawn
 No

41. If yes, please explain:

42. How many vials of blood did the examiner collect?

1 N/A – my blood was not drawn
 2

43. Was a urine sample collected?

Yes No

44. Were you asked your smoking history?

Yes No

45. Were you asked what medications are taken?

Yes No

46. Was your signature requested on the paperwork?

Yes No

47. Did the examiner remove all trash and materials used during the exam, with the exception of the urine collection cup?

Yes N/A – appointment was at an Exam One office
 No

48. If no, what material was left behind?

Examiner Interaction

49. Did the examiner make eye contact when speaking with you?

Yes No

50. Did the examiner smile when speaking with you?

Yes No

51. Did the examiner speak to you in a courteous and professional manner throughout your interaction?

Yes No

52. If no, please explain:

53. Did the examiner explain what would be done before they began the exam?

Yes

No

54. Did the examiner treat you with care and compassion when doing the exam?

Yes

No

55. If no, please explain:

56. Did the examiner allow you to ask questions if you had any?

Yes

N/A – I did not ask questions

No

57. Did the examiner offer a parting statement at the end of the appointment?

Yes

No

Overall Impression

58. Based on your overall experience with the examiner, how likely would you be to recommend Exam One to a friend or family member?

10 – Highly likely

5

9

4

8

3

7

2

6

1 – Not at all likely

59. Provide a summary of your interaction with the examiner:

Be specific when describing the examiner's demeanor, their professionalism, the exam process, and your overall impression of the examiner.

60. Upload any paperwork you received at the appointment:

END OF QUESTIONNAIRE