METABOLIC BALANCE

Offboarding Guide

FOR COACHES IN TRAINING

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Congratulations!

COACH OFFBOARDING GUIDE

This Offboarding Guide is intended to serve as your ultimate guide or cheat sheet as you move forward with working with your clients.

Please store this guide in a safe place where you can easily reference it whenever questions arise in the future.

WHAT'S INCLUDED IN THIS GUIDE:

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Login Guide

ONTARIO

COACH HUB

This is where you will find many resources, FAQs and training videos to keep you in the know.

You should have created the log in for the Coach Hub yourself. The link was sent during the training. The password was sent to you per Email right after the account was created. Let us know if you cannot find the password and we will resend it to you.

CLICK HERE TO ACCESS THE COACH HUB

COACH BACK OFFICE

This is where you request meal plans for your clients.

Before you can access the portal you will be asked to enter a preliminary username and password (see below). This is our first level of security. Your personal password and username was sent to you per Email during the Practical Part of the training. If you cannot find it anymore, please let us know and we will send it to you.

Preliminary Username: coach
Preliminary Password: VjMS3nezTz95wD7HS5e!

CLICK HERE TO ACCESS THE BACK OFFICE

ONTARIO LIFE LABS LAUNCHPAD

This is the portal to access your clients blood work results.

The lab sent you 2 Emails. One with the details about installing the SSL certificate and another Email with your username and password.

In case you have trouble with it, please Email:

ITServiceDesk@lifelabs.com

E-LABS USER GUIDE

LAUNCHPAD YOUTUBE TUTORIAL

SETUP GUIDES FOR LAUNCHPAD

Safari

Chrome

Firefox

Internet Explorer

PLEASE EMAIL US AT TEAM@METABOLIC-BALANCE.CA FOR SUPPORT

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Login Guide

BRITISH COLUMBIA

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Preliminary Username: coach
Preliminary Password: VjMS3nezTz95wD7HS5e!

CLICK HERE TO ACCESS THE BACK OFFICE

BRITISH COLUMBIA LIFE LABS EXCELLERIS

This is the portal to access your clients blood work results.

The lab sent you an Email to set you up.
You will have to fill out a form to select 'Launch Pad'.

In case you have trouble with it, please Email:

Support@Excelleris.com

EXCELLERIS YOUTUBE TUTORIAL

EXCELLERIS TROUBLESHOOTING

PLEASE EMAIL US AT TEAM@METABOLIC-BALANCE.CA FOR SUPPORT

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Login Guide

ALBERTA

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Preliminary Username: coach
Preliminary Password: VjMS3nezTz95wD7HS5e!

CLICK HERE TO ACCESS THE BACK OFFICE

DYNALIFE

This is how you will receive your client's blood work results.

DynaLife Labs reports are faxed to our office and then distributed through Proton-Mail. Please ensure you have set up your Proton Email address to receive your client's lab results.

CLICK HERE TO VISIT DYNALIFE

CLICK HERE TO SIGN UP FOR PROTON MAIL

PLEASE EMAIL US AT TEAM@METABOLIC-BALANCE.CA FOR SUPPORT

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Login Guide

ALBERTA CONTINUED

DYNALIFE CONTINUED

There are two different requisition forms to be used in Alberta for DynaLife Laboratories. One is for the DynaLife locations in the Edmonton area and rural areas.

The other one is called transition requisition form and is for some former Alberta Precision Lab locations, mostly in the Calgary area.

Only locations that are listed on the location list can be used!

Please ensure you have the correct requisition to give to your clients. Please also make sure you have YOUR name in the "CHART NUMBER" box on the requisition. (see image below)

Once you share a requisition form to your client, send us a quick email with the client name, so we can forward the results to you even if the lab forgot to enter your name as the coach. (Unfortunately, this happens frequently)

CLICK HERE TO FIND LAB LOCATIONS FOR EDMONTON & SURROUNDS

CLICK HERE TO FIND LAB LOCATIONS FOR CALGARY & SURROUNDS

Coach Name


DynaLIFE MEDICAL LABS

THIRD PARTY LABORATORY REQUISITION

DynaLIFE Medical Labs 1 (800) 661-9876 or (780) 451-3702

Appointment Booking & Locations: www.dynalife.ca

Patient: ☐ Male ☐ Female ☐ X (Non-Binary/Prefer not to Disclose)

Provider: 18805 | DL-37543 | TRANSITION - GET Nutrition Consulting Inc. | 416-508-6222

199947 | Bernstein, Dr. Ira | Client Bill

Collection

Epic Data Entry: Use 'Requisition Entry' | Client Bill | ☒LAB71878

Millennium Data Entry: 023258A | Community | Company Bill | 1602197 | ☒PROCBL

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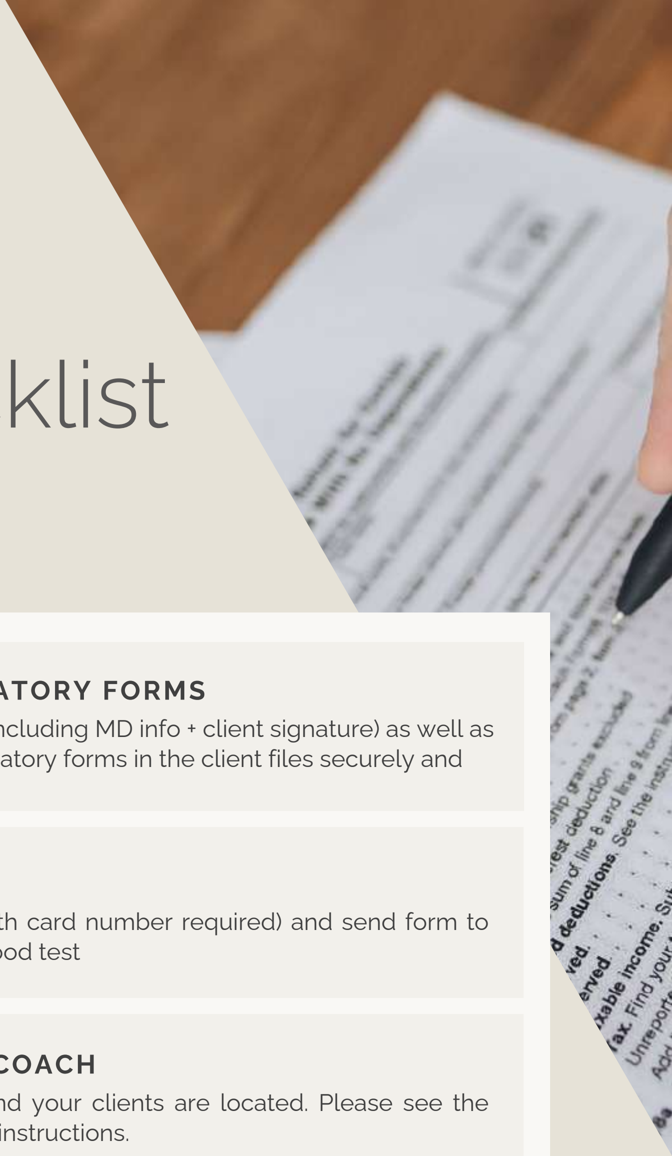

Step-by-Step Checklist

YOUR GUIDE TO COACHING CLIENTS

CLIENT SIGNS UP & COMPLETES MANDATORY FORMS

The client must complete the Personal Profile form (including MD info + client signature) as well as the Consent Form. The Coach must store these mandatory forms in the client files securely and have it available at any time upon request.

PREPARE FOR BLOOD TEST

> Enter client data into the requisition form (no health card number required) and send form to client. > Client needs to fast 8-12 hours prior to the blood test

LAB SENDS BLOODWORK RESULTS TO COACH

This will look different, depending on where you and your clients are located. Please see the Labs & Blood Work guide for more province-specific instructions.

ENTER DATA INTO THE BACK OFFICE

> Log on to www.metabolic-balance.ca and enter blood results and the client's personal data into the system.
> Don't hesitate to refresh yourself on these steps via our Practical Part videos, or by visiting our Frequently Asked Questions.

VERIFY DATA IN THE BACK OFFICE

Confirm that the data in the Verify Data section is correct before the next step.

COACH REQUESTS THE MEAL PLAN IN THE BACK OFFICE

Once data is submitted in the system, request the plan for your client. Once it's returned, read the plan from cover to cover to avoid any mistakes.

TIME TO COACH!

Coach splits the meal plan into single phases. DO NOT include the coach analysis in the client-facing plan. Once the plan is ready, begin with consultation phases 1 & 2 before moving on to 3 & 4, for a total of 5 coaching hours (minimum).

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Mandatory Forms

PROVIDE THESE FORMS TO YOUR CLIENTS

PERSONAL PROFILE FORM

Each client must provide the required information, including the Medical Doctor name, and sign the Personal Profile, BEFORE the blood work can get done. The Coach must store the Personal Profile Form in the client files securely and have it available at any time upon request.

When you request a plan, you have to check off that the client has signed the Personal Profile and Consent Form in order to continue with the plan request.

CONSENT FORM

Each client must read and sign the Consent Form, BEFORE the blood work can get done. The Coach must store the Consent From in the client files securely and have it available at any time upon request.

LAB REQUISITION: (FORM IS LAB-SPECIFIC)

Client will be required to bring this form with them to the lab. In provinces other than AB/ON/BC, the client needs a MD stamp on it first.

PRIVACY POLICY (OPTIONAL)

We have a template in our Coach Hub Resource Library that you may use as a guideline

TERMS OF SALE (OPTIONAL)

Every business needs a Terms of Sales policy in place by law. This form is acting as a template for you in case you do not have such a form in place. This form includes the language and information required by the Consumer Protection Act (CPA) in a form that would not require you to have a separate written agreement with your clients. Please note that this was made by a lawyer in Ontario and might be different in other provinces. Feel free to adjust it for your own needs.

INFO LETTER FOR MEDICAL DOCTOR (OPTIONAL)

The Information letter should be used in the case that your clients Medical Doctor is involved in the progress. This can be the case if your client wants to share the results with your Doctor.

PHASE TWO QUESTIONNAIRE (OPTIONAL)

You may use this as a guide

TESTIMONIAL FORM (OPTIONAL)

To capture a client success story formally.

ALL FILES CAN BE FOUND IN THE RESOURCE LIBRARY - CLICK HERE TO ACCESS

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FAQs

ONE OR MORE BLOOD MARKERS ARE MISSING IN THE REPORT, CAN I STILL REQUEST THE PLAN?

When one or more blood markers are missing, you will not be able to request your client's plan. All mandatory fields from the Metabolic Balance portal need to be properly filled in.
Blood markers can be missing for many different reasons (e.g., incomplete initial requisition, lab error, hemolyzed blood marker, derived blood markers cannot be calculated, etc.). Please reach out to the lab directly to evaluate what solution may apply. **Please provide the lab with the full client's name, date of birth and date of blood collection.** The lab will then be able to help.

Please find the contact person for your lab HERE

Client Consent (Alternative): In some cases, if obtaining a new blood sample is challenging, you may consider seeking written consent from your client to use a 'random middle-range' number for the missing result. However, this option should only be pursued when the client agrees to it. It's not the preferred method, as it may not provide entirely accurate data.

WHAT SHOULD YOU DO WHEN A BLOOD RESULT IS MISSING IN THE LAB REPORT?

If blood markers are missing from the lab report, you need to contact the lab directly to evaluate what solution may apply. You then need to provide the lab with the client's full name, date of birth and date of blood collection. Usually, they can still access the sample and report the missing result if it is not too long ago. The lab will then be able to help.

Please find the contact person for your lab HERE

WHY IS THE SYSTEM FLAGGING ONE OR MORE BLOOD RESULTS IN RED?

After you fill in all the necessary blood markers and save your entries, the system may snag one or several markers as out-of-range. The system may then invite you to take responsibility for these out-of-range values by opting for a manual plan request.

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FAQs

WHAT SHOULD I DO WHEN A LAB REPORT RETURNS HEMOLYZED BLOOD PARAMETERS, MAKING THE PARAMETERS INVALID DUE TO A COMPROMISED BLOOD SAMPLE?

When a lab report indicates hemolyzed blood parameters, it means that the blood sample obtained for testing has been damaged or compromised, rendering the results unreliable. In such cases, it's crucial to take the following steps:

1. Contact Lab: First, refer to the lab contacts in the Coach Hub (Labs & Blood Work) to initiate communication with the laboratory that conducted the test. Inform them about the issue with the hemolyzed blood parameters.
2. Provide Client Information: When reaching out to the lab, make sure to provide essential client details, including the client's full name and date of birth. This information helps the lab identify the specific client and their test results.
3. Describe the Problem: Clearly explain the problem that occurred, which is the presence of hemolyzed blood parameters in the test results. It's essential to communicate the compromised nature of the sample.
4. Request Retest: Request the lab to organize a retest for the affected parameters. A retest will provide accurate and reliable results for those specific tests.
5. Lab Assistance: The lab staff is typically experienced in handling such situations. They will assist you in resolving the issue by providing you with a one-time requisition form for the missing tests. This form will ensure that the client can undergo the necessary testing again.

Client Consent (Alternative): In some cases, if obtaining a new blood sample is challenging, you may consider seeking written consent from your client to use a 'random middle-range' number for the missing result. However, this option should only be pursued when the client agrees to it. It's not the preferred method, as it may not provide entirely accurate data.

In summary, when dealing with hemolyzed blood parameters in a lab report, it's essential to promptly communicate with the lab, provide client information, describe the problem, and request a retest. The lab's assistance will be instrumental in ensuring accurate and reliable test results, which are crucial for requesting a personalized Metabolic Balance plan.

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FAQs

WHAT IS THE SIGNIFICANCE OF TAKING RESPONSIBILITY FOR AN EXTREME BLOOD VALUE?

When blood markers are flagged in red within our system, it indicates that these values fall outside the normal range. Please have a look at the 3 Blood Work Scenarios. In such cases, you, as a coach, may be prompted to take responsibility for these unusually high or low values and proceed with a manual plan request. Before endorsing these extreme values, it's essential to perform certain steps:

1. Client Assessment: Initially, assess your client's situation. Determine if there are any factors that might explain the extreme blood value, such as a known medical condition, recent injury or recent physical activity like sports.
2. Verification: To ensure data accuracy and prevent typographical errors, repeat the snagged result in the designated box where the system requests you to verify data (Manual plan request). This step is crucial as it informs the head office that the value wasn't entered erroneously.

By taking responsibility for extreme blood values, you're acknowledging the need for a manual plan request, but it's equally vital to verify the data and consider any relevant client factors before proceeding. This diligence ensures that the client's health assessment is accurate and comprehensive.

THE LAB COULDN'T CALCULATE THE LDL-CHOLESTEROL VALUE DUE TO HIGH TRIGLYCERIDES (TG). WHAT SHOULD I DO NEXT?

If TG levels are too high, consider alternative methods for assessing LDL-Cholesterol. You can find best practices here. Please note that our lab employs only one calculation method and will not provide calculated LDL-Cholesterol when TGs are too high. The traditional Friedewald equation is invalid with TGs greater than 4.5 mmol/L. However, the Sampson-NIH2 equation can be used with TGs up to 9 mmol/L.

Alternatively, with the client's agreement, you can enter the high-end range of LDL-Cholesterol as indicated in your lab's range on the client report, allowing you to proceed with the plan request. However, please be aware that this option may not provide entirely accurate data.
Remember, all blood values required for creating a plan must be filled in. Leaving any fields blank or with a "0" will result in the plan request being returned to you for correction by the head office.

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FAQs

HOW OLD CAN A LAB REPORT BE TO QUALIFY FOR A PLAN REQUEST?

A lab report cannot be more than 2 months old to qualify for a Metabolic Balance plan request.

HOW LONG DOES THE CLIENT HAVE TO FAST BEFORE THE BLOOD TEST?

8 to 12 hours. Only drinking plain water is allowed during this time.

WHAT TO DO AND WHOM TO CONTACT IF ANYTHING IS GOING WRONG WITH THE LAB?

Please find the contact person for your lab HERE

MY CLIENT IS AT THE LAB AND THE STAFF IS ASKING FOR DR. IRA'S ADDRESS:

Tell your client that the staff at the lab needs to call Contract Services immediately. This is an internal number where the staff that is lost gets the answer directly from the correct department. Everything the staff needs to know is on the requisition form and therefore they should not ask for the Doctors Adress.

The address is: Lawrence Ave, Toronto, if that is the only solution that the staff accepts.

MISSING REPORT IN LAUNCHPAD WHAT SHOULD I DO?

If you are not seeing your client's report in your Launch Pad account, it means that the staff at the lab forgot to enter your name as a cc of the report. In a case like that, reach out to your lab contact person who can then upload the report for you. This will take less than 5 minutes.
Please do not call the lab directly, email them instead. The staff is not trained for third-party accounts like ours. That is why we have actual contact persons who know what to do in certain situations.

ON contact: contractserviceson@lifelabs.com
BC contact: contractservicesbc@lifelabs.com

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Blood Work

3 SCENARIOS

SCENARIO #1

The client has blood work done and nothing shows up flagged High or Low. If the client decides to share the blood results with their own Medical Doctor, then the blood work can be handed out along with our MD Info Page- Go to Resource Library - Your Metabolic Balance to find the MD Info Page.

SCENARIO #2

The Blood work comes back and something is indicated by the Lab as HIGH or LOW. Our doctor decides if a medical follow up is required or not... This means that our doctor- who is the requesting physician – is responsible to report to us, if a client needs a medical follow up due to High or Low results or not. This is the reason why he is hired by Metabolic Balance – to overview the blood results.

In the case that the HIGH or LOW results are not clinically significant, meaning, they do not require a medical follow up – then our doctor will not even think about reporting this result to us as it is not clinically significant.
There are many examples like that – that's why our doctor needs to be the one – and the only one, reaching out to us to indicate whether a medical follow up is required or not. Otherwise, we would risk that we scare the client over something not important. Furthermore, the coach is not legally allowed to make comments about the blood work.

Now in that case, if the client wants to show those 'not clinically significant' results to their doctor, then the MD Info Page is also handed out along with the blood results. There are 3 different letters so please watch out for the province they apply to. Find MD Info Page here: Resource Library - Your Metabolic Balance

SCENARIO #3

The blood report comes back and there are dangerously high or low results in the report. In cases like that, our doctor reaches out to us and I inform the coach. Then the coach sends me the client's Medical Doctor information (Name Address, Phone) and our doctor writes a personal letter to the client's doctor and starts a conversation as well as attaches the blood work.

These are 3 the scenarios that can happen.... You will see plenty of reports with 10-15 High or Low results. Please never inform the client before speaking to us / our doctor because you are not supposed to 'Read' clients blood other than using it for the Meal Plan.

IMPORTANT REMINDER: *Metabolic Balance only accepts clients who are assigned to a Medical Doctor, who could potentially be involved, if 'Scenario 3' occurs. If a person does not have a medical doctor, it is not permitted to take her / him on as a Metabolic Balance client. This is a protection for you as well as us and there cannot be any exception.*

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Lab Contact

DETAILS

Below is a list of all of the Canadian Laboratories with whom we work with. You may reach out to them directly if you have a missing report or received incomplete blood work results. Make sure to indicate that you are a Metabolic Balance Coach.

AB	**DYNALIFE LABORATORY, ALBERTA** Faye Chambers: Faye.Chambers@dynalife.ca Marina Bischler: Marina.Bischler@dynalife.ca
BC	**LIFE LABS, BRITISH COLUMBIA** ContractServicesBC@lifelabs.com For technical issues with LaunchPad, please contact 1-866-728-4777 or support@excelleris.com
ON	**LIFE LABS, ONTARIO** ContractServicesON@lifelabs.com For technical issues with LaunchPad please contact LifeLabs IT Service Desk at 1-800-465-6001 or ITServiceDesk@lifelabs.com
QC	**BIRON, QUEBEC** imarquez@biron.com Josée Thifault: jthifault@biron.com
QC	**DYNACARE, QUEBEC** Customer_Service_Montreal@dynacare.ca
SK	**LIFE LABS, SASKATCHEWAN** Robin Lowe: Robin.Lowe@lifelabs.com

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Important Links

Once again thank you so much for your participation in our course and congratulations on completing your training!

You'll always have access to our Coach Hub - a platform that has been created as a resource for you as a Metabolic Balance Coach. We are constantly updating this Hub, so please check in with it frequently & be sure to check there if you have any questions.

VISIT OUR FAQs

VISIT THE COACH HUB

BUILD YOUR BUINESS

Our support team can be reached at team@metabolic-balance.ca