



HEALTH CENTER WORKFLOW TEMPLATE

Health Center Name: _____

Names of Staff Completing this Template _____



Repeat x22 for each class

Patient completes Start Up Visit with _____(staff name):

- If not completed already, patient MUST sign Patient Agreement Form at this time. _____(staff name) scans and saves signed it in _____(location in patient's medical record)
- Assist patient to log into Wellocity app/portal
- Complete pre-program screening questions
- Assist with communication resources as needed
- Distribute Patient Care Kit tools
- Teach patient how to use tools
- Complete baseline measurements

Curriculum sessions are scheduled in EHR by _____(staff name) and distinguished in the EHR by _____(e.g., visit type, etc.)

_____ (staff name) logs into Wellocity to review the data participants have logged, and provides ongoing support and troubleshooting.

_____ (staff name) documents _____(which data) in _____(location in patient's medical record).

Curriculum session occurs. _____(staff name) provides support in curriculum delivery as Lifestyle Coach.

_____ (staff name) calls patient and schedules time to pick up additional tools.

_____ (staff name) delivers additional tools to patient's home.

_____ (staff name) distributes additional tools throughout program and trains patient how to use them.

If _____ (which data points) are _____ (which values), _____ (staff name) will be informed by _____ (phone call, EHR message, etc.)

If patient drops out of the program at any point, tools are returned to _____(staff name) for sanitizing and storing.

If a tool is damaged or not working properly 3 months or less since it has been distributed to a patient, _____ (staff name) will collect the damaged tool and provide the patient with a replacement.

_____ (staff name) checks in with participants every _____ (week, month, etc.) via _____ (phone, telehealth visit, etc.) between curriculum sessions.

_____ (Staff name) ensures post-program screening questions are completed.