



Wellocity User Guide

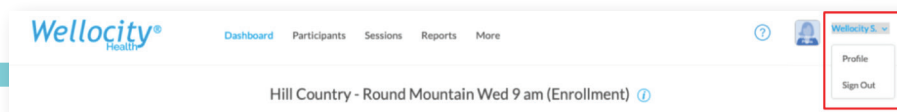
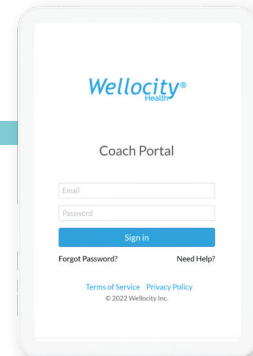
for Healthy Together Lifestyle Coaches

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SIGNING IN & OUT

Sign in to the [Wellocity Coach Portal](#) with your username and password.

To sign out, select **Sign Out** from the Profile Menu.

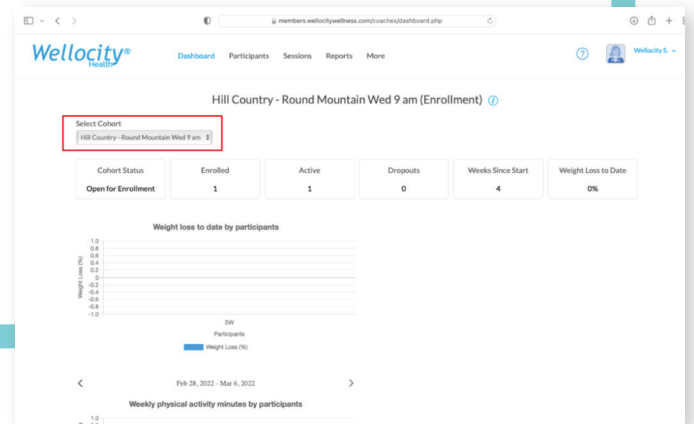


UPDATE PARTICIPANT LIST

Only required once when the enrollment ends

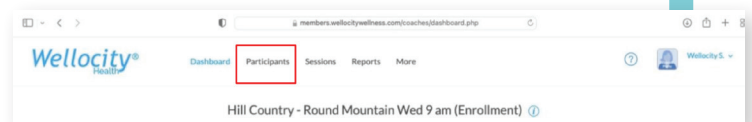
STEP ONE

Select a cohort on the **Dashboard** page. The Dashboard page shows the % weight loss, activity and participant count, and status for the selected cohort.



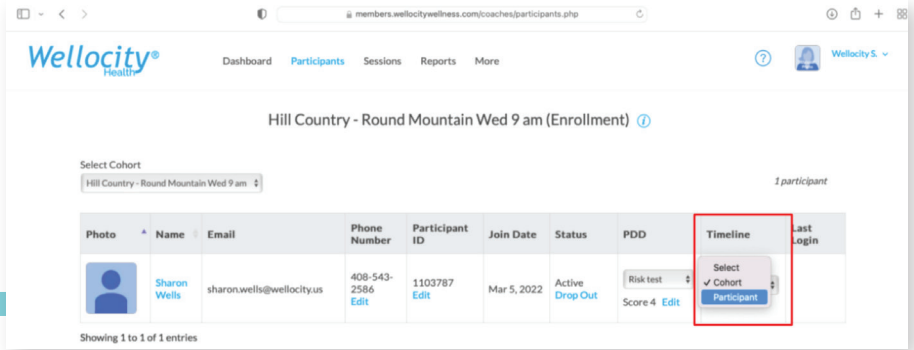
STEP TWO

Select **Participants** from the Menu.



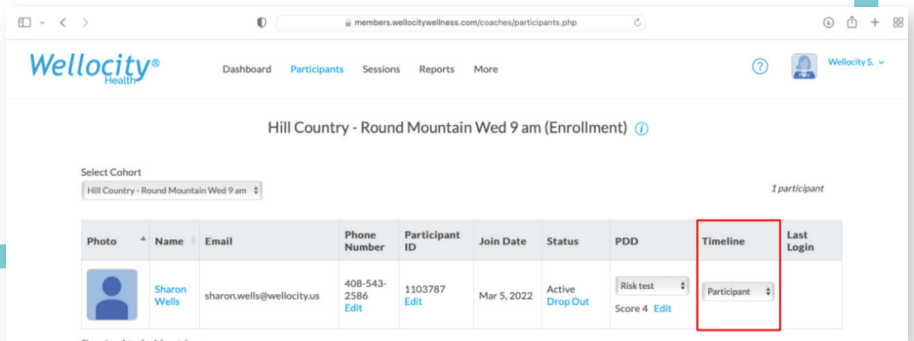
STEP THREE

For each Participant in the Participant list, Select **Participant** from the **Timeline** choices.



STEP FOUR

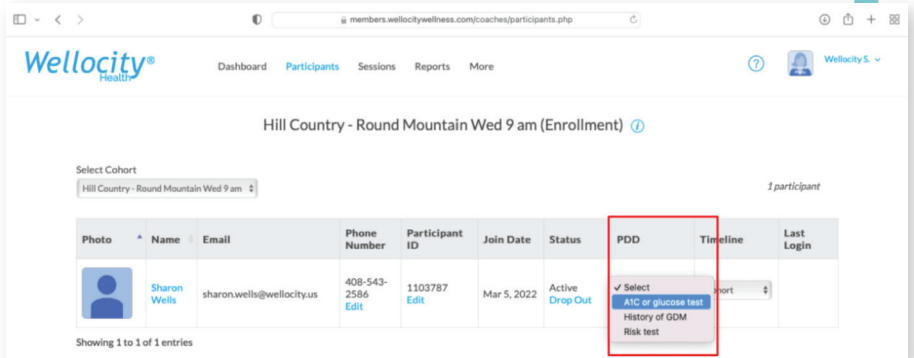
Confirm the **Timeline** field for all Participants shows **Participant**.



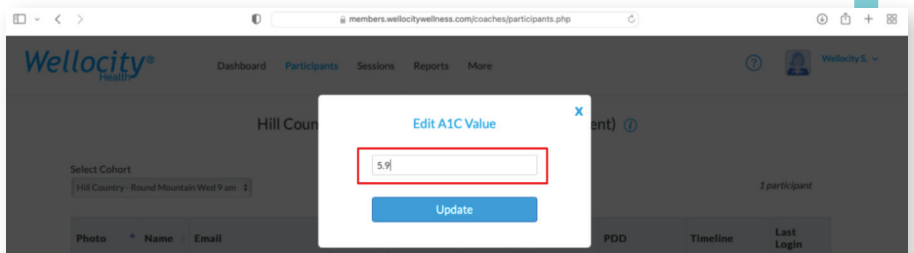
STEP FIVE

Select the Prediabetes Determination (**PDD**) for each Participant diagnosed with prediabetes based on a fasting blood glucose (FG), oral glucose tolerance test (OGTT), A1c, or a lab test result indicating a diagnosis of prediabetes.

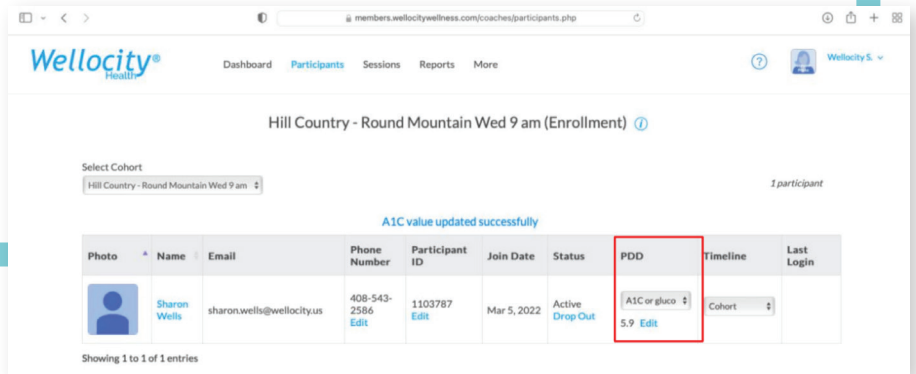
(a) Select **A1C** or **glucose test** in the **PDD** column.



(b) Edit and Enter the Participant's reported HbA1c value and 999 if not reported and select **Update**.

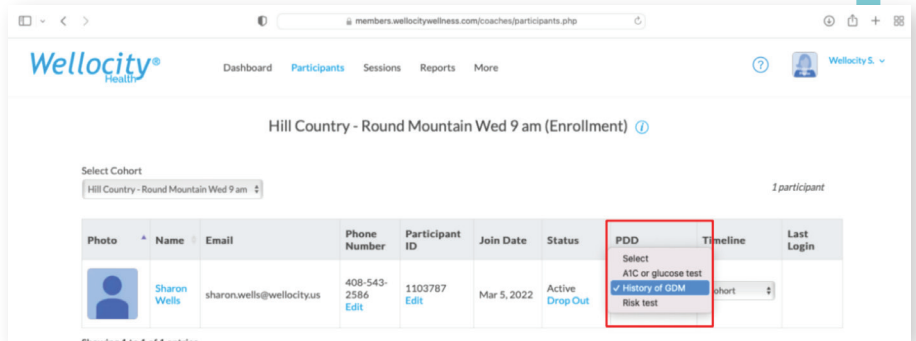


(c) Verify the A1C values for all Participants diagnosed with prediabetes.



STEP SIX

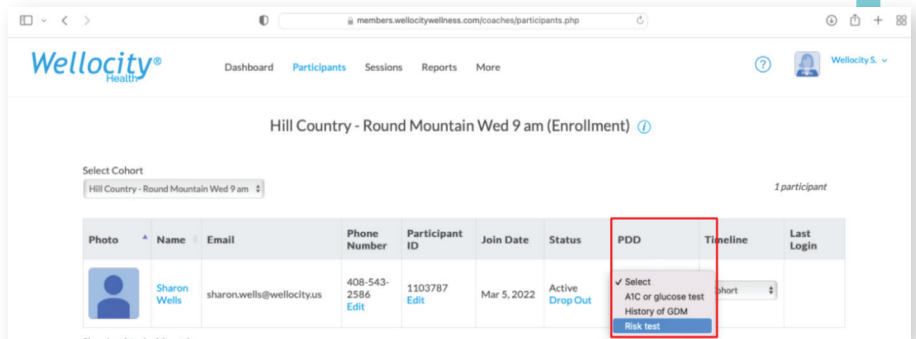
Select the Prediabetes Determination (PDD) for all Participants previously diagnosed with gestational diabetes. Select **History of GDM** in the PDD column.



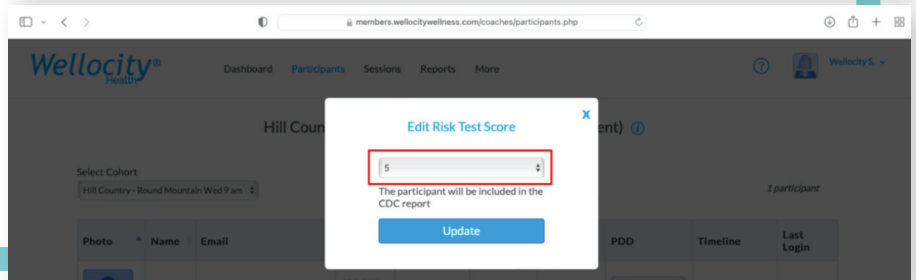
STEP SEVEN

Select the Prediabetes Determination (PDD) for each Participant prediabetes that qualified for the program with the Risk test.

(a) Select **Risk test** in the PDD column.



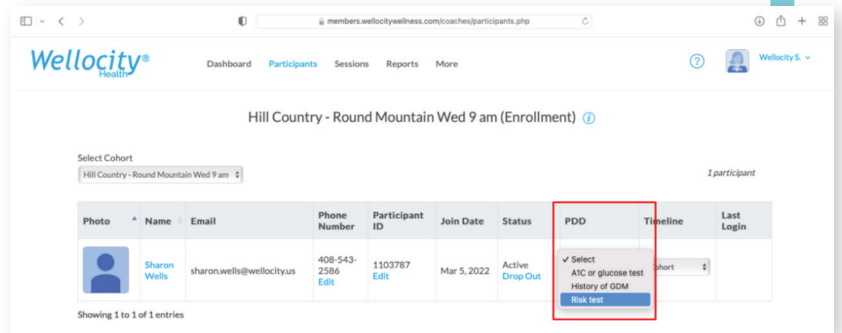
(b) Edit the Risk score, select 5, and select **Update**.



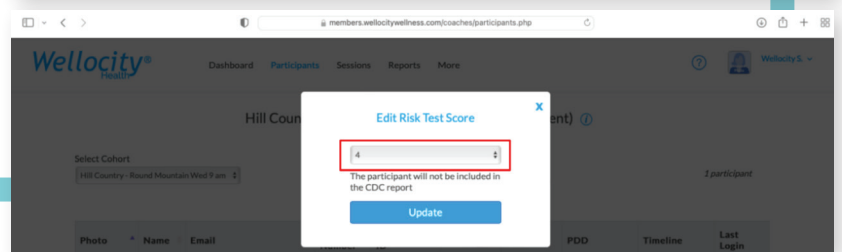
STEP EIGHT

Select the Prediabetes Determination (**PDD**) for each Participant diagnosed with diabetes. *Wellocity will not include these participants in the CDC report.*

(a) Select **Risk test** in the **PDD** column.



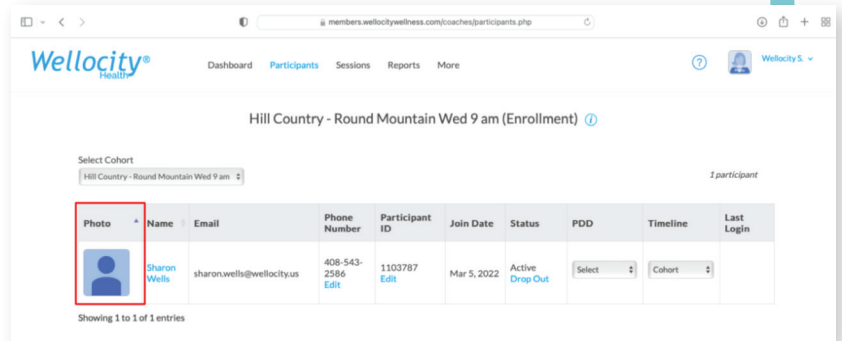
(b) Edit the Risk score, select 4, and **Update**.



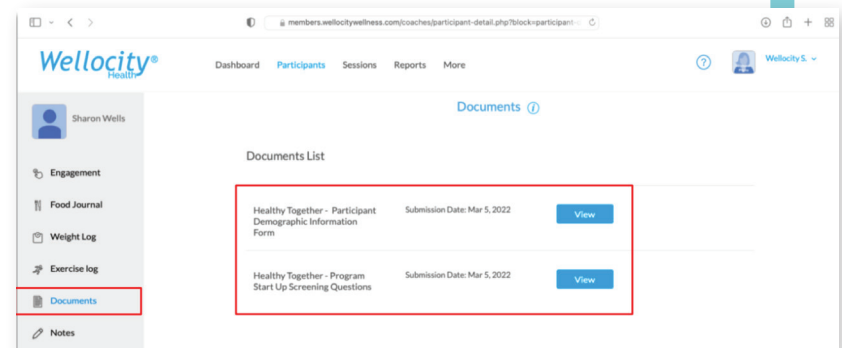
STEP NINE

Confirm each participant in the cohort has submitted the Demographic form and the Startup Questionnaire.

(a) Select a **Participant** from the list and click on the photo to view the data for the Participant.



(b) Select **Documents** from the sidebar Menu and confirm the Participant submitted the required forms below.



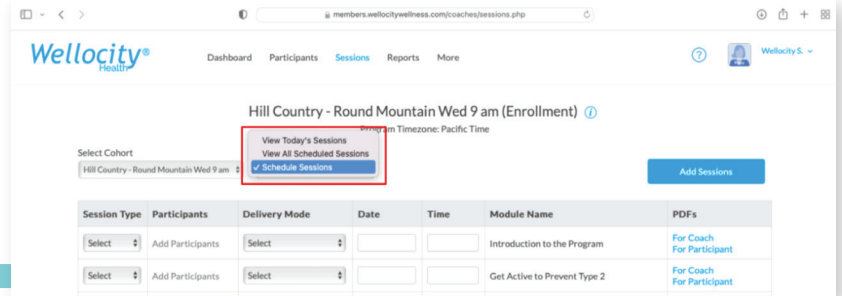
Important: If a form is missing on this page, contact support@wellocitywellness.com immediately and provide the following:

- The missing form Name(s)
- Demographic information, Startup Questionnaire, or both.
- Participant's Name
- Participant's Email

SCHEDULE AND START SESSION

STEP ONE

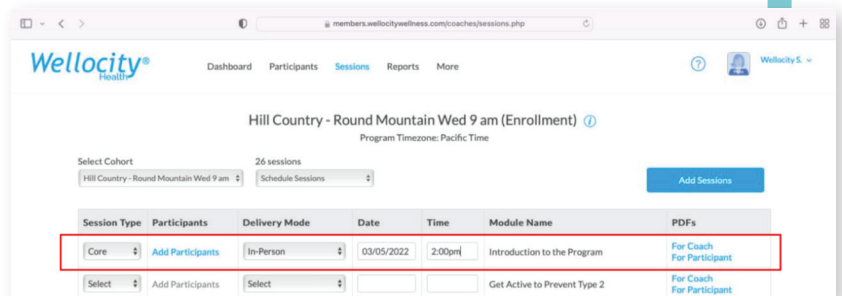
From the Dashboard, select **Sessions** from the Menu and then select **Schedule Sessions**.



STEP TWO

Add an In-person Session by consulting your Class Schedule Spreadsheet:

- Module Name: select a Prevent T2 lesson module
- Session Type: Core
- Delivery Mode: In-Person
- Date: Date of the session
- Time: Time of the session

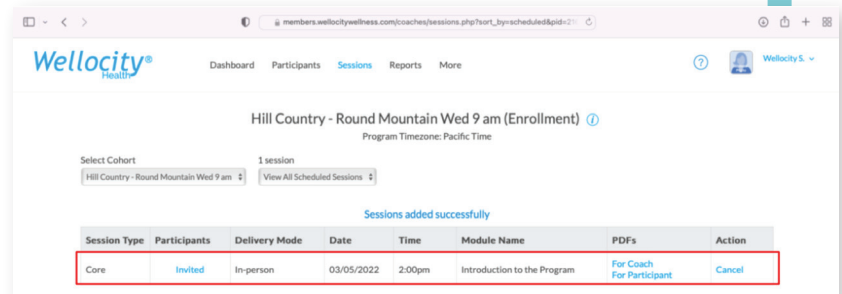


Finally, click **Add Sessions**.

Note: The **Add Participants** link is only used for a makeup session, and for regular sessions, Wellocity automatically invites all participants in the cohort.

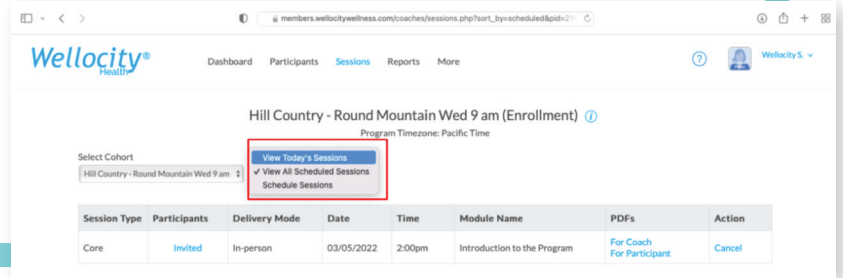
STEP THREE

View the session you just scheduled and click the **Invited** link to view the list of invited Participants.



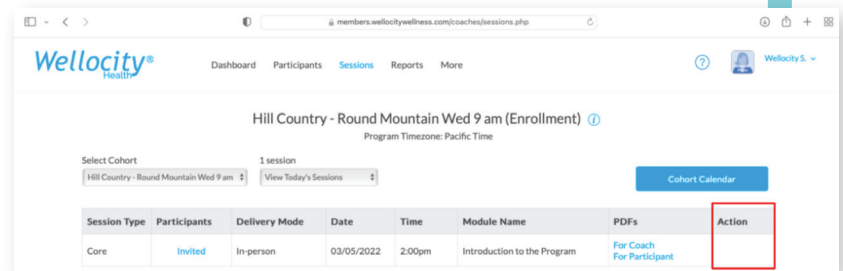
STEP FOUR

On the day of the session, select View Today's session to see the session listed.



STEP FIVE

There is no Action on this page for an in-person session. Wellocity publishes the lesson module for today in the app and portal and sends an email to notify the Participants.

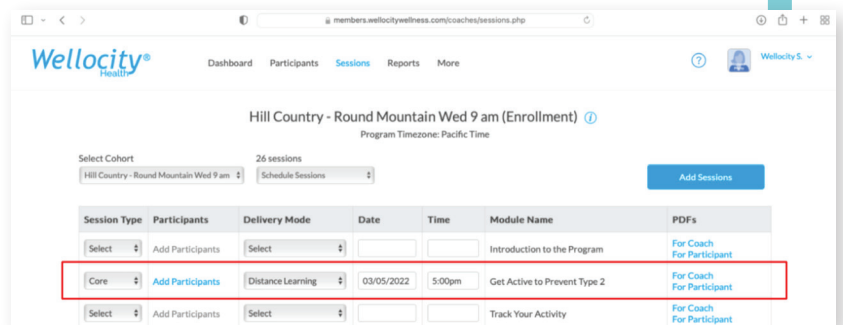


STEP SIX

Add a Distance Learning Session by consulting your Class Schedule Spreadsheet:

- Module Name – select a Prevent T2 lesson module
- Session Type – Core
- Delivery Mode – Distance Learning
- Date – Date of the session
- Time – Time of the session

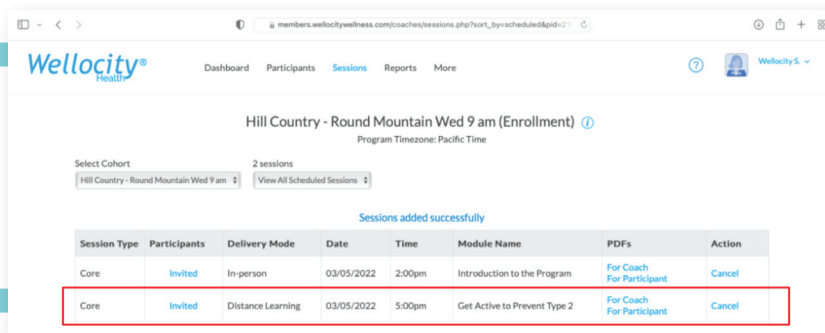
Finally, click **Add Sessions**.



Note: The **Add Participants** link is only used for a makeup session, and for regular sessions, Wellocity automatically invites all participants in the cohort.

STEP SEVEN

View the session you just scheduled.

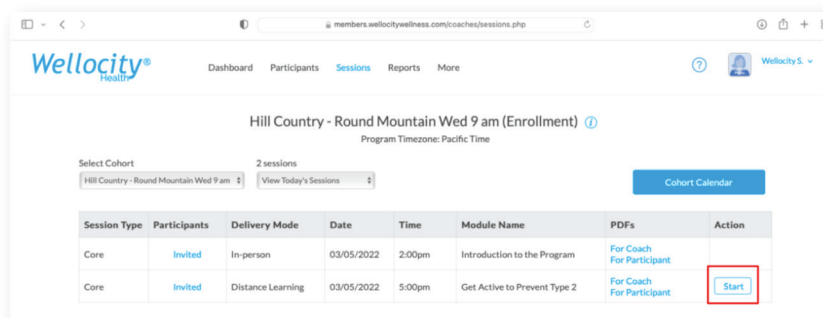


STEP EIGHT

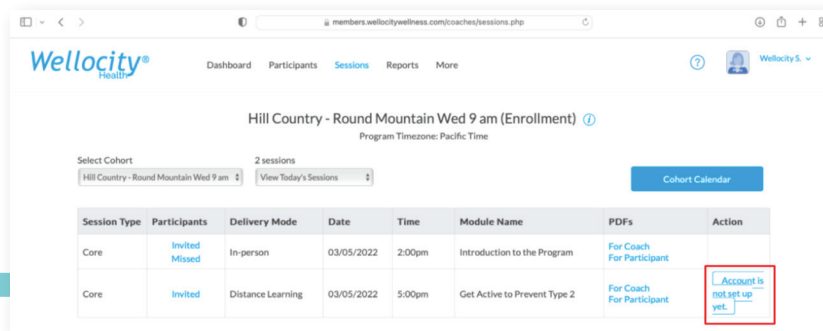
Select **View Today's session** to see both listed sessions on the day of the session.

STEP NINE

The Action field for a Distance Learning session shows a Start button used to start the session no sooner than 5 minutes before its scheduled time. Wellocity publishes the lesson module for today in the app and portal and sends an email to notify the Participants with instructions on how to **join** the session.

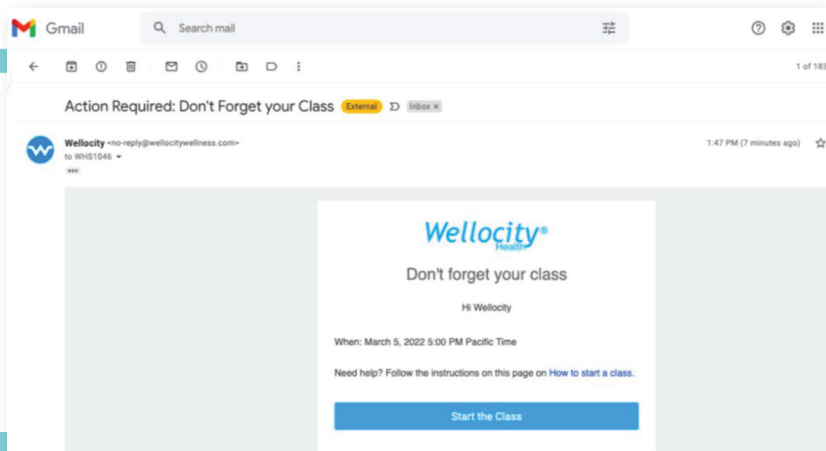


Important: Contact your HUB Admin if you don't see a Start button for a Distance Learning session but instead see the message shown below "Account is not set up yet."



STEP TEN

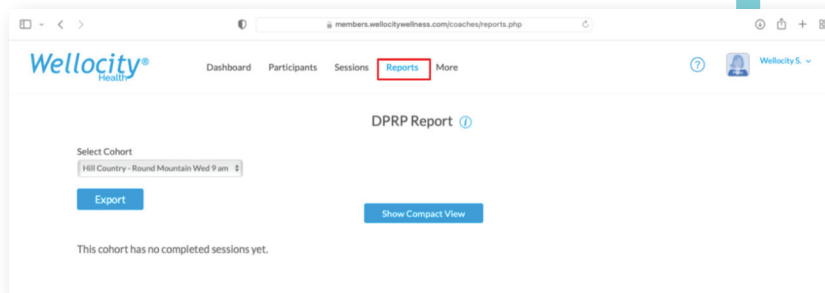
For Distance Learning sessions, Wellocity also sends a reminder email to start the session to all lifestyle coaches and administrators assigned to the cohort.



VIEW REPORTS AND UPDATE PARTICIPANT DATA

STEP ONE

From the Dashboard, select **Reports** from the Menu. The report will be empty until the first session is held, when it is updated with a record for each Participant that attended.

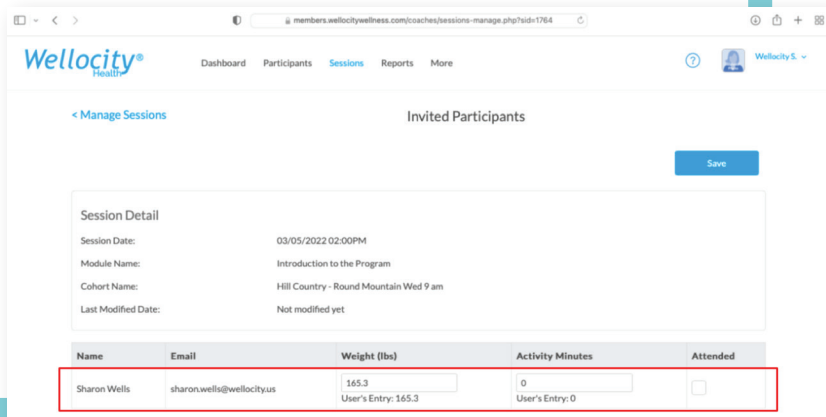
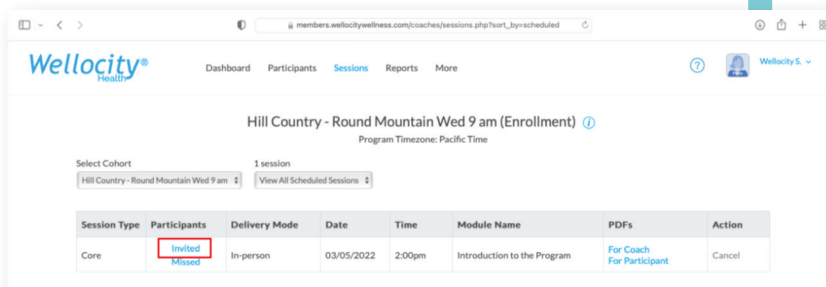


STEP TWO

Update Participant data. Once a session ends, the lifestyle coach can enter a participant's weight and physical activity minutes (PA) and update attendance.

(a) Select a session on the **View all Sessions** page and click the **Invited** link.

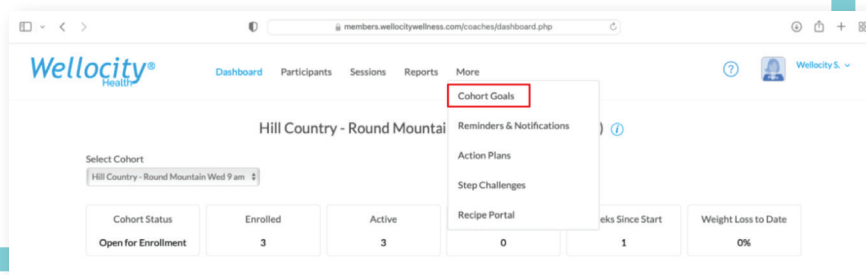
(b) Select a Participant and update the Weight, PA, and attendance as needed and **Save**.



SET COHORT GOALS AND REMINDERS

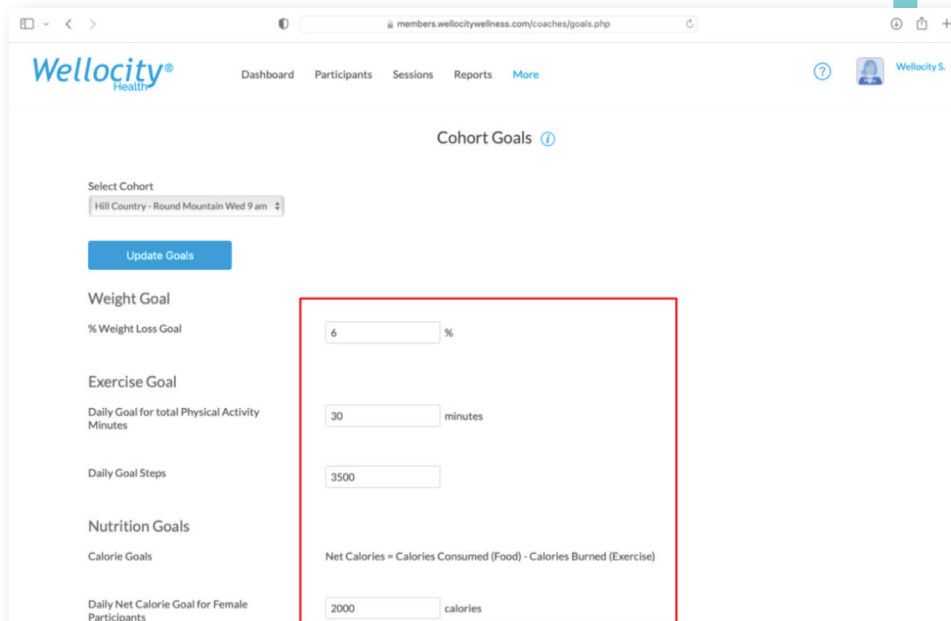
STEP ONE

From the Dashboard, select the **More** Menu and select **Cohort Goals**.



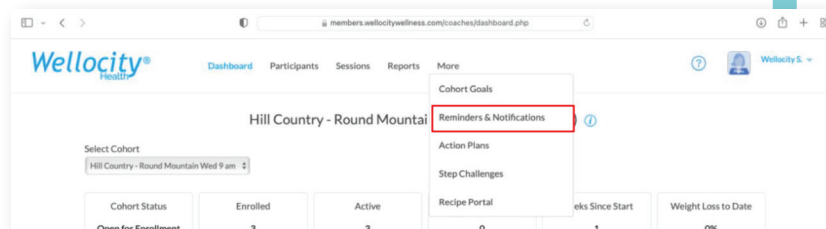
STEP TWO

Update the % weight loss goal, daily exercise goals, and goals for nutrition as needed.



STEP THREE

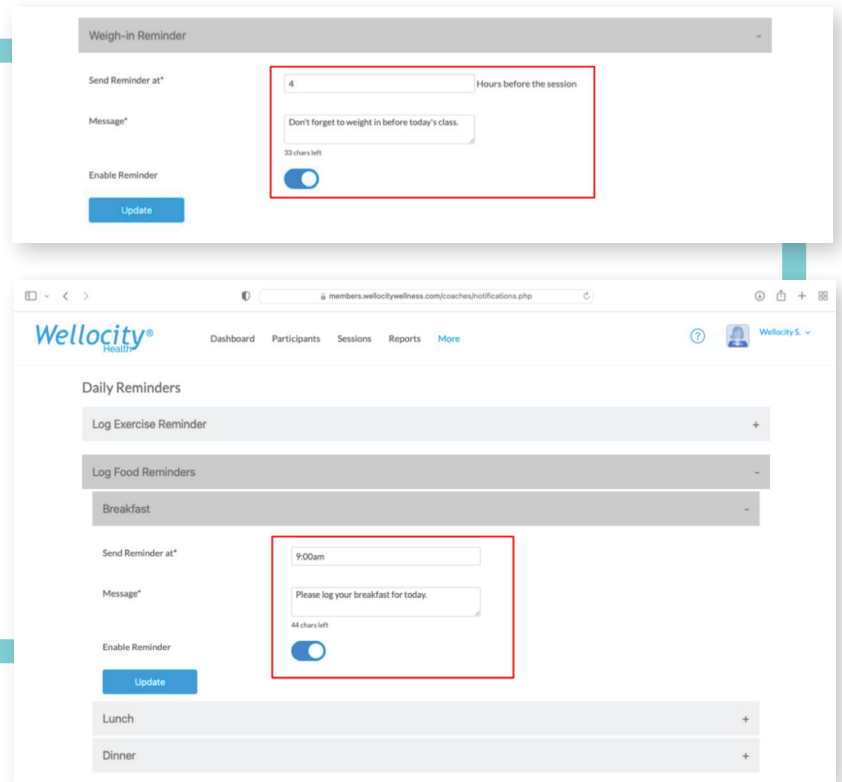
From the Dashboard, select the **More** Menu and select **Reminders and Notifications**.



STEP FOUR

Set reminders for weigh-ins, logging exercises, and meals and enable them by turning on the switch.

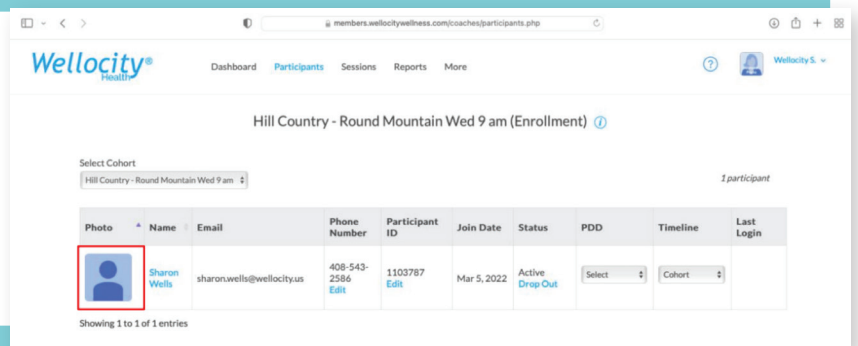
Note: The Generic PUSH Notifications on this page are not sent to portal users.



VIEW PARTICIPANT DATA (LIFESTYLE COACH'S DAY-TO-DAY ACTIVITIES)

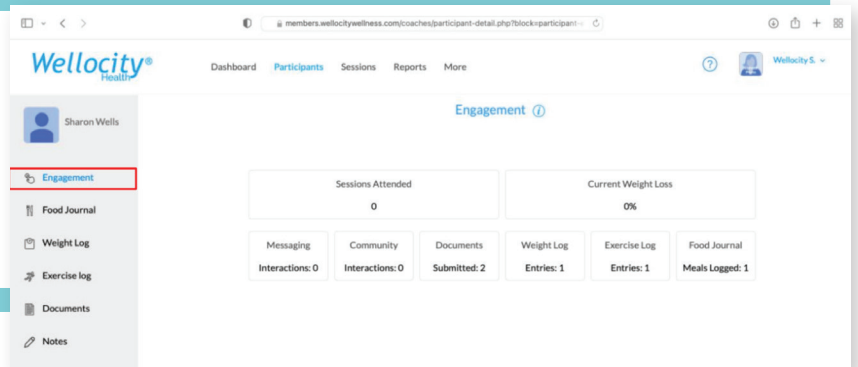
STEP ONE

From the Participants list, select a participant and click on the photo to view the data for the Participant.



STEP TWO

The **Engagement** details all the Participant's activities to date.



STEP THREE

Select **Food Journal** from the sidebar Menu to view the meals logged by the Participant.

The screenshot shows the Wellocity Health dashboard for a participant. The sidebar menu on the left includes 'Engagement', 'Food Journal', 'Weight Log', 'Exercise log', and 'Documents'. The 'Food Journal' item is highlighted with a red box. The main content area is titled 'Engagement' and displays several metrics: Sessions Attended (0), Current Weight Loss (0%), Messaging Interactions (0), Community Interactions (0), Documents Submitted (2), Weight Log Entries (1), Exercise Log Entries (1), and Food Journal Meals Logged (1).

STEP FOUR

Select **Weight Log** from the sidebar Menu to view the Participant's weight log.

The screenshot shows the Wellocity Health dashboard for a participant. The sidebar menu on the left includes 'Engagement', 'Food Journal', 'Weight Log', 'Exercise log', and 'Documents'. The 'Weight Log' item is highlighted with a red box. The main content area is titled 'Weight' and displays metrics for 'Today, March 05, 2022': Last Weigh-in (165.3 lbs (03-05-2022)), Time Left (56 Weeks), and Current Goal (155.4 lbs). It also shows 'Progress' with Start Weight (165.3 lbs), Total Lost (0 lbs), and Left to Lose (9.9 lbs). A 'Trends' section includes a 'Weight Report Timeline' set to '3 Months'.

STEP FIVE

Select **Exercise Log** from the sidebar Menu to view the Participant's exercise log.

The screenshot shows the Wellocity Health dashboard for a participant. The sidebar menu on the left includes 'Engagement', 'Food Journal', 'Weight Log', 'Exercise log', and 'Documents'. The 'Exercise log' item is highlighted with a red box. The main content area is titled 'Exercise' and displays metrics for 'Today, March 05, 2022': Total Activity Minutes (15 mins), Daily Goal (30 mins), Steps Taken (1765), and Daily Goal (3500 Steps). A 'Trends' section includes an 'Exercise Report Timeline' set to '3 Months' and a 'Duration Chart'.

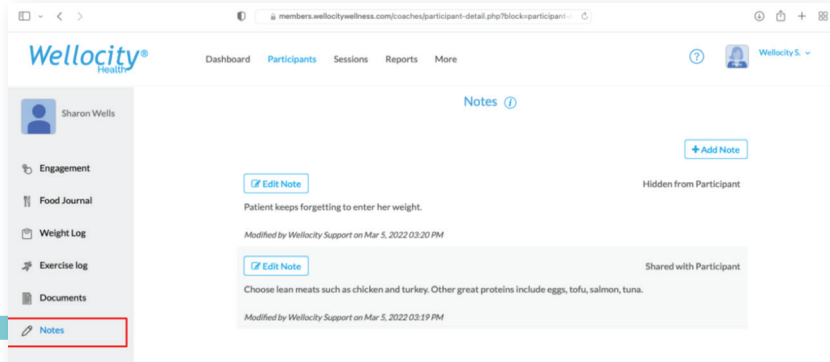
STEP SIX

Select **Documents** from the sidebar Menu to view the documents submitted by the Participant.

The screenshot shows the Wellocity Health dashboard for a participant. The sidebar menu on the left includes 'Engagement', 'Food Journal', 'Weight Log', 'Exercise log', and 'Documents'. The 'Documents' item is highlighted with a red box. The main content area is titled 'Documents' and displays a 'Documents List' with two entries: 'Healthy Together - Participant Demographic Information Form' and 'Healthy Together - Program Start Up Screening Questions', both with a submission date of Mar 5, 2022 and a 'View' button.

STEP SEVEN

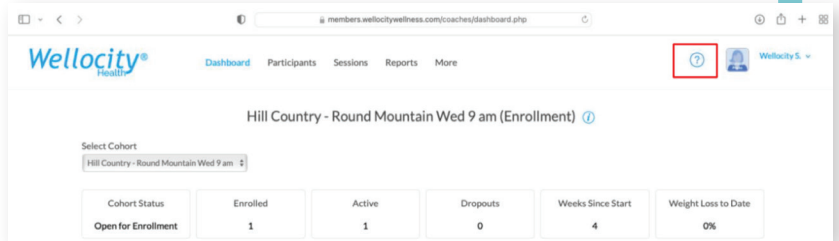
Select **Notes** from the sidebar Menu to create, edit and send Notes to the Participant.



HELP AND SUPPORT

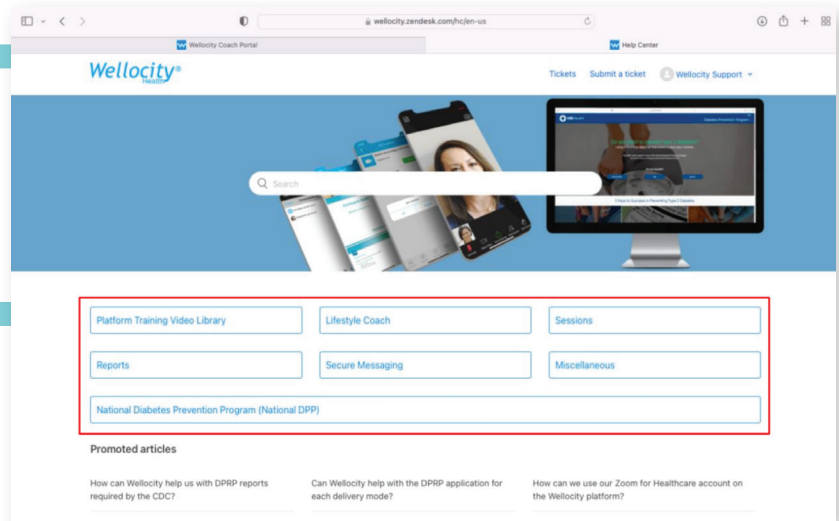
STEP ONE

Select the “?” on the Menu from any page coach portal to access the built-in help center.



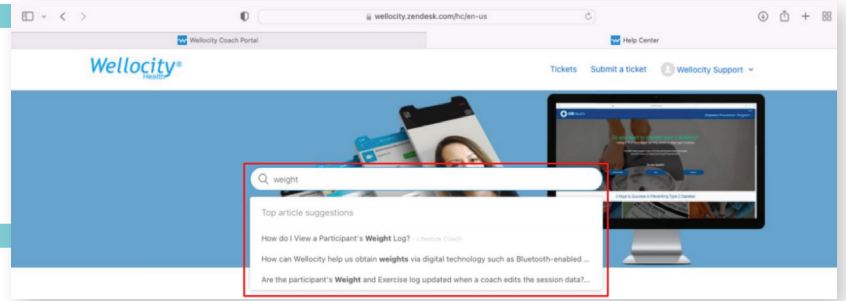
STEP TWO

Access How-to videos, FAQs, and help articles.



STEP THREE

Search for answers.



STEP FOUR

Submit Tickets.

