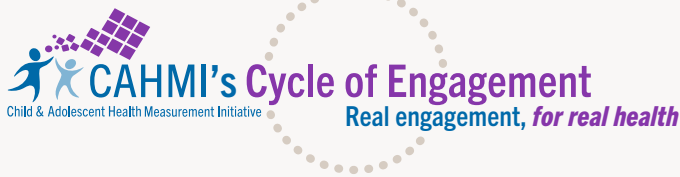


Quick Guide to Getting a Cycle of Engagement Account

Instructions and Preparation Worksheet



This quick guide walks you through the steps you need to take to register for a **Cycle of Engagement (COE) account and dashboard**. From your COE dashboard you can then **customize your Well Visit Planner® (WVP) and/or Online Promoting Healthy Development Survey (PHDS)** websites for use with the children and families you serve. You will manage your customized family engagement tools from the WVP and/or Online PHDS use portals, where you also access implementation resources.



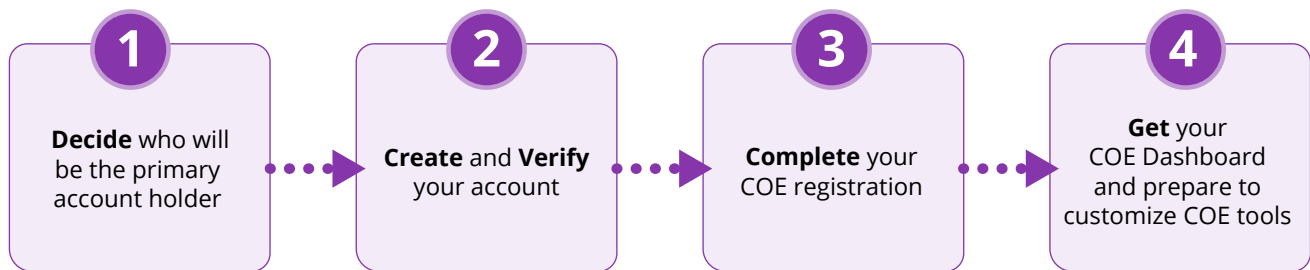
Do this before you begin!

Decide to get a customized Well Visit Planner® and/or Online Promoting Healthy Development Survey website to use with the children and families you serve. If you are not sure, please [learn more here](#).

Make sure you can receive your verification email from info@cycleofengagement.org

[Click here](#) to see instructions.

The Four Step Cycle of Engagement (COE) Registration Process:



Step 1: Confirm the primary account holder and identify others who should have account privileges:

Primary account holders are responsible for receiving family data and agreeing to terms of use:

Before you start the COE registration process you need to decide who the primary account holder should be. Primary account holders will be responsible for receiving the Clinical Summaries and Well Visit Guides produced when families complete the Well Visit Planner (WVP) as well as for receiving the Promoting Healthy Development Survey (PHDS) Aggregate Quality Reports. They will also agree to the terms of use ([Use Agreement](#) and [Privacy Notice](#)). Families proactively agree to have WVP results shared with the account holder, who is named in the account holders customized WVP website welcome message.

Primary account holders can be providers or any person or organization families agree to partner with:

Typically the account holder will be the child health professional who conducts well visits with children and families. However, others who support families can use the COE model and tools as well (e.g., family support specialists, home visitors, community health workers, early care/education professionals, etc.). A clinic or organization can also be a primary account holder as long as they assume responsibility for receiving family data and families agree to share data.

Primary account holders can give access privileges to others:

Primary account holders can give privileges to others they wish to manage their COE account and WVP and Online PHDS use portals, including accessing and using Clinical Summaries, changing customizations, using implementation support resources, etc. Individuals with access privileges must create their own username and password and verify their account as well.

Primary account holder: _____

Step 2: Create and Verify Your COE Account

Tell us which COE tools you're planning to customize and use with the children and families you serve.

Well Visit Planner® (WVP)

A brief family-completed, online pre-visit planning tool where families share strengths and goals, complete recommended developmental, psychosocial screeners; pick priorities and get a Well Visit Guide and resources. Providers receive a Clinical Summary.

Online Promoting Healthy Development Survey (PHDS)

A post-visit family-completed survey that yields a set of validated quality indicators aligned with Bright Futures' implementation standards and get a feedback report to partner in improving quality. Providers receive an aggregate data report after at least 25 families respond.

Let us know if you are interested in using the WVP and/or Online PHDS for any of the following purposes (this helps us tailor support for you):

- Engage families to personalize their well care while ensuring the provision of comprehensive, guideline-based care
- Meet child and family screening requirements
- Improve on performance standards
- Renew Maintenance of Certification (MOC, Part 4) credit (available soon)
- Other, please specify: _____

Select from the following options to let us know how the account holder will be using the COE tools and who is completing the registration:

Option 1:

One individual provider or care team

Only children/families receiving care from one provider/care team will be asked to complete the WVP and/or Online PHDS using the personalized website links created under this COE account.

I am registering this account:

- For myself as the primary account holder
- As a staff/coordinator on behalf of a primary account holder
- Other, please specify: _____

IMPORTANT NOTE:

The **primary account holder** is the person responsible for receiving family data and for accepting the terms of use as outlined in the Use Agreement and Privacy Notice. **This person must verify the CAHMI COE verification email to complete registration.**

Option 2:

More than one provider or care team

Children/families receiving care from more than one provider/care team will be asked to complete the WVP and/or PHDS using the same personalized website links created under this COE account.

I am registering this account:

- As the designated provider for our group of providers/care teams
- As the person who will administer and manage this account across multiple providers

IMPORTANT NOTE:

The **designated provider** serving as the primary account holder must be legally qualified to accept the terms of use as outlined in the Use Agreement and Privacy Notice on behalf of all providers/care teams that will share the single COE account. **The designated provider will verify the account registration on behalf of all providers/care teams and will have access to the COE Dashboard, the WVP and PHDS User/Data Portals and all other resources.**

Information you will need:

- Primary account holder **first and last name:** _____
- Email address:** _____
- A personal password** with at least 8 characters including one number, one special character, one uppercase and one lowercase character. ●●●●●

We DO NOT recommend including your account password in this worksheet to protect your account security. Please save your password in a secure place.

(Optional)

You can add people you (the primary account holder) wish to allow access to this account by listing their name and email.

You may wish to have a member of your team access your COE account, make changes and access your WVP and Online PHDS data dashboards to retrieve family Well Visit Guides, your Clinical Summaries, implementation resources, data reports and to manage your customization specifications for you.

IMPORTANT NOTE:

Additional account holders **will not be able to continue registration and log in until the primary account holder has verified their COE account** and completed registration. Once verified, each additional person listed to have access to the account will be notified via email and will be asked to create their own COE account email and password. After this they can log in to your account, access the data dashboard and modify your COE account and WVP and/or PHDS portals.

Information you will need:

- Additional account holder's **first and last name:** _____
- Email address:** _____

Verify Your Account:

- Check your email you used to register for a message from **info@cycleofengagement.org**
- Confirm you accept terms of use
- Click the verification link to continue with step 3 of registration

IMPORTANT NOTE:

If you have **not received your verification email** and it has been over 2 minutes, you may need to do one or more of the following:

- Check your junk or spam folder
- Move the email from your junk folder to your inbox to ensure all links are clickable.
- Check with your email administrator to ensure you can receive emails from **info@cycleofengagement.org**

Step 3: Complete Your COE Registration

Once you verify your account you will be able to complete registration by answering a few more questions about you, your practice or organization, and the families you serve. This information helps us to know more about your context and to support your use of the COE model and tools.

You will be asked to indicate:

- Your role in working with children and families
- Practice or organization type
- Name and address of your practice
- Name of the larger organization you work with (if applicable)
- Average number of children under age 6 you provide well child care per month (*Your best estimate is fine*)
- Percentage of children you serve who have chronic conditions or other special health care needs (including physical, mental, developmental, or behavioral issues) (*Your best estimate is fine*)
- The type of health insurance the children you serve have
- The type of geographic area where you work with children and families

Step 4: Get Your COE Dashboard and Prepare to Customize COE Tools

- Please sign-in to go to your new COE dashboard: **<https://implement.cycleofengagement.org/login>**
- From your COE dashboard you can begin to customize and implement the **Well Visit Planner® (WVP)** and/or **Online Promoting Healthy Development Survey (PHDS)** family websites for use with the children and families you serve.

What can you do on your COE dashboard?

- Get a quick guide to prepare to customize your Well Visit Planner and/or Online PHDS family websites
- Use the Quick Links to customize your family websites and access your use portals
- Use left navigation menu to get resources to create your plan, engage your families, get data reports family resources and support to partner in care with families and the community.
- Update or manage your COE account
- Track completions of the WVP and Online PHDS by families

See our [WVP and Online PHDS Customization Instructions and Preparation Worksheet](#)