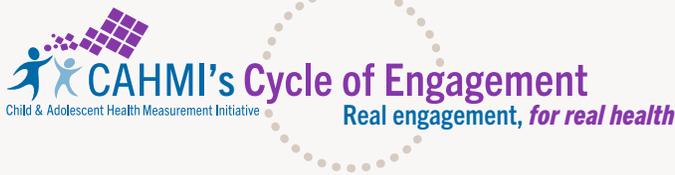


Quick Guide to Getting a Cycle of Engagement Account

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 can also access implementation resources.



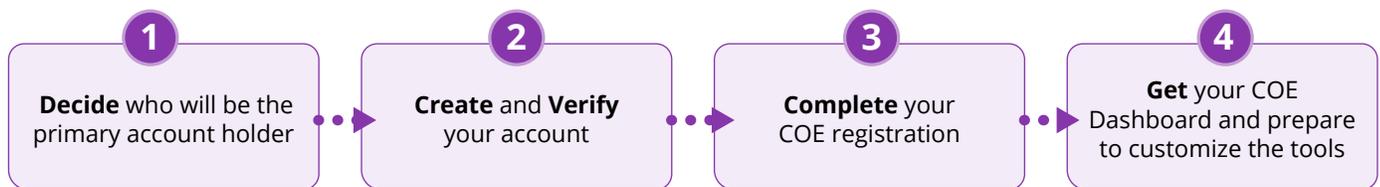
Do this before you begin:

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 verification emails 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 the 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 agree to the Terms of Use (Use Agreement and Privacy Notice) and be responsible for receiving:

- The Clinical Summaries and Well Visit Guides produced when families complete the Well Visit Planner (WVP). Families proactively consent to share their data with the account holder.
- The Promoting Healthy Development Survey (PHDS) Aggregate Quality Reports.

Primary account holders can be providers or organizations. The primary account holder can be:

- A child health professional who conducts well visits with children and families (e.g., pediatrician, nurse practitioner and other child health care professionals).
- A provider that supports and empowers families such as family support specialists, home visitors, community health workers, early care/education professionals, family navigators etc.
- A clinic or organization that may include multiple providers/service professionals or any other organization that supports children and families and designates someone to agree to the Terms of Use.

Primary account holders can give access privileges to others:

- Primary account holders can give privileges to others they wish to access their COE Dashboard and WVP and PHDS Use Portals, including accessing and using Clinical Summaries (CS), Well Visit Guides (WVG) and family resources, changing customizations, using implementation support resources, etc.
- When the same individual, like a staff member, is given access privileges across more than one primary account holder, that person will be able to change customization settings and access the Data Dashboard for each account holder. They will also be able to reassign or share family WVGs and provider CSs across primary account holders.
- Primary account holders assume accountability for giving access privileges to individuals who can abide by Terms of Use. Each individual that is given account access privileges must also create their own password and verify their account as well. They also proactively agree to the Terms of Use.

Primary account holder: _____

Step 2: Create and Verify Your COE Account



Tell us which COE tools you plan 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 and 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 produces 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 (*Optional*)

- 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: _____

This helps us tailor support for you!

Select from the following account holder options outlined in Step 1:

 **Please review** the "Well Visit Planner® Customization Options and Family Website & Provider Use Portal Key Features" to decide **which account option best meets your needs and goals.**

Option 1: An individual account

(E.g., pediatricians, nurse practitioners, other child health care professionals, family support specialists, home visitors, community health workers, early care/education professionals, family navigators).

Children/families receiving care from one provider will be asked to complete the WVP and/or Online PHDS using the personalized WVP and/or Online PHDS website links created under this COE account. You can add a staff or coordinator as an additional account holder to manage your COE account and data dashboard.

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: A clinic, center or organization

(A group of providers will be sharing a single account and data dashboard through one designated primary account holder).

Children/families receiving care from more than one provider will be asked to complete the WVP and/or Online PHDS using the customized WVP and/or Online PHDS website links created under this COE account. Your organization will need to assign a designated primary account holder to manage your organization account and data dashboard that is shared across providers within your organization.

I am registering this account:

- As the designated primary account holder on behalf of my clinic, center or organization
- As a staff/coordinator or a member on behalf of the primary account holder
- Other, please specify: _____

IMPORTANT NOTE:

The **designated 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 primary account holder will verify the account registration on behalf of all providers/care teams to complete registration.**

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.

Please save your password in a secure place to protect your account security.

(Optional) Additional people you (the primary account holder) **wish to allow to access this account.**

You may wish to have a staff/coordinator or member of your team who can complete registration and access your COE Dashboard to manage your WVP and/or PHDS customization specifications; and to access your Data Dashboards to retrieve family Well Visit Guides (WVG), your Clinical Summaries (CS) and data reports, and implementation resources for you. If you and another provider have the same additional account holder, that person will be able to share WVGs and CSs across both accounts. You and the other provider can also share WVP data directly with each other.

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.** Once verified, each additional person listed to have access to the account will be notified via email and will be asked to complete your COE account registration if you wish to do so. Then they will create their own COE account password and accept the Terms of Use as outlined in the Use Agreement and Privacy Notice. After this they can log in to their account, access the Data Dashboard and modify your WVP and/or PHDS websites.

Information you will need:

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

Verify Your Account:

- Check the email you used during registration for an email from **info@cycleofengagement.org**
- Accept the Terms of Use
- Click the verification link to continue onto 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 or the additional account holder 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/center/organization
- Name of the larger organization you work with (if applicable)
- The type of health insurance the children you serve have
- Average number of children age 6 and under you provide preventive services (well child care) for 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 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.

See our **WVP and Online PHDS Customization Instructions and Preparation Worksheet**

What can you do on your COE Dashboard?

- Get a checklist 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.