

# Checklist for WVP Customization

Things you need to customize your Well Visit Planner® (WVP)



[Click here](#) to see the Instructions and Worksheet to Prepare Customizing and Using the WVP.

- A short, recognizable, and easy to remember name for your customized website link

e.g., "DrJones", your customized WVP URL will look like: wellvisitplanner.org/DrJones

- The name of the child health professional and the name of the practice or organization you want to have included in the customized welcome message families will read on your customized WVP homepage

e.g., "Dr. Jones from Promise Pediatrics invites you to take about 10 minutes to complete the Well Visit Planner..."

## OPTIONAL: Logo

A logo or photo you wish to appear on your customized WVP website

## OPTIONAL: Opt out

Choose to opt out of a WVP Data Dashboard and have no access to family responses to WVP

- I want a WVP Data Dashboard to receive family data (*Well Visit Guides and Clinical Summaries*)
- I do not want a WVP Data Dashboard to receive family data (*no access to Well Visit Guides and Clinical Summaries*)

## OPTIONAL: Additional assessments

Links to additional assessments you would like families to complete

- Links to other questions or assessments you want families to complete that are in addition to (1) the comprehensive, age-visit specific and guideline-based screeners included in the core WVP and (2) additional assessments CAHMI provides to be added to your customized WVP (scored and reported to you)
- Age visit(s) for which the assessment should be completed (first week, 1, 2, 4, 6, 9, 12, 15, 18-month, 2, 2 ½, 3, 4, 5, 6-year visits)
- Links to English and/or Spanish language versions of assessments
- Any instructions families need to access the assessment link (e.g., a password)

## OPTIONAL: Additional resources

Links to additional resources you want to share with your families

- Links to additional resources to share with families in the family Well Visit Guide
- Age visit(s) for which the resources will be shared (first week, 1, 2, 4, 6, 9, 12, 15, 18-month, 2, 2 ½, 3, 4, 5, 6-year visits)
- Links to English and/or Spanish versions of resources
- Any instructions for families to use the resources

## Ways to receive notifications when families complete your customized WVP and/or about new Well Visit Guides and Clinical Summaries

**Note:** After each WVP use, the Well Visit Guide and Clinical Summary is automatically uploaded to your WVP Data Dashboard.

- A secure email where you want to receive notifications when new Clinical Summaries are available for you in your WVP data dashboard (if different than the email used to register for a COE account)

Ways you may want families to share their Well Visit Guide (WVG)/Clinical Summary (CS) **other than getting it on your WVP Data Dashboard**

- A secure email you want families to email the WVG/CS to
- A link to the Patient Portal families can use to upload the WVG/CS to
- Instructions for families to upload their WVG/CS to their Patient Portal

## OPTIONAL: Share with providers

Share Well Visit Guides and Clinical Summaries with other providers

- Provider/primary account holder's name and email you would like to share WVP family data with
- Additional account holder's (staff/coordinator or a member of the organization) name and email to enable data sharing between providers

**Congratulations!** You have finished customizing your Well Visit Planner.

# Checklist for Online PHDS Customization

## Things you need to customize your Online Promoting Healthy Development Survey (PHDS)



- A short, recognizable, and easy to remember name for your customized website link

e.g., "DrJones", your customized Online PHDS URL will look like: [onlinephds.org/DrJones](https://onlinephds.org/DrJones)

- The name of the child health professional and the name of the practice or organization you want to have included in the customized welcome message families will read on your customized Online PHDS homepage

e.g., "Dr. Jones from Promise Pediatrics has invited you to complete this brief tool..."

[Click here](#) to see the Instructions and Worksheet to Prepare Customizing and Using the Online PHDS.

### OPTIONAL: Logo

A logo or photo you wish to appear on your customized Online PHDS website



### OPTIONAL: Additional resources

Links to additional resources you want to share with your families

- Links to additional resources to share with families in their PHDS Feedback Report
- Age visit(s) for which the resources will be shared (4, 6, 9, 12, 15, 18-month, 2, 2 ½, 3, 4, 5, 6-year visits)
- Links to English and/or Spanish versions of resources
- Any instructions for families to use the resources

- Your secure email address where you would like to receive notifications about available PHDS Aggregate Reports

### COMING SOON:

Use the Online PHDS to obtain professional credits, American Board of Pediatrics Maintenance of Certification credit or CME credit.



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## Congratulations!

You have completed customizing your Online Promoting Healthy Development Survey.

Your next step is to create your plan and begin engaging families to implement the Online PHDS using the resources provided in your PHDS Use Portal!