

# Instructions and Worksheet

to customize the **Well Visit Planner® (WVP)** and **Online Promoting Healthy Development Survey (PHDS)** for use with children and families

This instruction sheet outlines the steps you need to take **to customize the Well Visit Planner® (WVP) and/or Online Promoting Healthy Development Survey (PHDS) websites** for use with the children and families you serve.

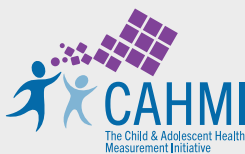
If you have already registered for a **Cycle of Engagement (COE) account** and received your COE Dashboard, you can begin to customize your WVP and Online PHDS using your COE Dashboard. When you are done, you will get access to the WVP and PHDS Use Portals where you can start to implement the tools with your families.

**Cycle of Engagement**  
*Real engagement, for real health*

See our **Instructions and Worksheet to Register for a COE Account and Dashboard.**

Email us at [info@cycleofengagement.org](mailto:info@cycleofengagement.org) for more assistance.

Check each ☒ check box before you proceed to get your customized websites.



Copyright © 2023 Child and Adolescent Health Measurement Initiative, Center for the Advancement of Innovative Health Practices.

Continue to the **WVP** Customization Instructions and Worksheet

# Well Visit Planner® (WVP)

## Customization Instructions and Preparation Worksheet



### Step 1: Create a simple, unique URL name for your customized Well Visit Planner® (WVP) family website link

1. Create a short, recognizable, and easy to remember name for your customized Well Visit Planner® link (e.g., "DrJones", "PromisePediatrics").

- Families you serve will use this customized link to access your WVP family website.
- You will also get a QR code families can scan to access your customized WVP.
- Please note that your URL "name" will also serve as your "Provider ID code," which families can also type in to access your customized WVP from the public use family website (<https://www.wellvisitplanner.org>).

You will receive a toolkit on how to engage families once you customize the WVP and get your Use Portal.

#### REQUIREMENTS:

- Your customized WVP name **should not include any spaces or special characters** (e.g., ! " # \$ % & ' ( ) \* + , - . / : ; < = > ? @ [ \ ] ^ \_ ` { | } ~).
- **Do not add a web domain extension**, such as .org or .com.
- **You can include up to 25 characters.** Shorter is better! Pick something that is recognizable and easy for families and for you to remember.

☐ Your short name \_\_\_\_\_ (wellvisitplanner.org/YourShortNameHere)

2. Provide 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 that families will read on your customized WVP homepage (e.g., "Welcome to the Well Visit Planner. **Dr. Jones** from **Promise Pediatrics** invites you to take about 10 minutes to complete the Well Visit Planner...").

☐ Child health professional name: (e.g., Dr. Jones): \_\_\_\_\_

☐ Practice or organization name (e.g., Promise Pediatrics): \_\_\_\_\_

3. (Optional) Add a logo or picture you want to show at the top of your WVP family website

#### REQUIREMENTS for logos or photos:

- The image file you upload must be in one of the following file formats: jpg, jpeg, gif, png. The file must be smaller than 0.5 MB, or 500KB.

☐ I have found and saved a logo or photo to access when I customize my WVP website.



## Step 2: (Optional) Add links to any additional assessments you would like families to complete

Here you can add **links** to questions or assessments **that are in ADDITION to (1)** the comprehensive, age-visit specific and guideline-based screeners included in the WVP and **(2)** additional assessments we provide to be added to your customized WVP. You can pick the visit age and language (English or Spanish) that you want assessments to be assigned to.

### PAUSE AND CHOOSE:

**Before you consider adding links** to additional assessments, carefully review the core content of the **WVP and the additional assessments** available to add to the core. After you complete the WVP customization steps, you can add additional assessments and questions we make available by selecting the “Add Additional Questions and Assessments” left navigation bar on your WVP Use Portal. The results of these assessments and questions are scored and reported in the Well Visit Guides and Clinical Summaries.

**How It Works:** Any links to additional assessment you add in this step will appear in the family Well Visit Guide with directions from you to families. Families’ responses to additional assessments added by you will not be scored or reported to families on their *Well Visit Guide* or on your *Clinical Summary*. Responses will be shared with you through the mechanism specific to that tool (e.g., results are sent to you separately or families bring their results to you during the visit).

☐ I have links to additional **assessments** *not offered through the WVP* that I want my families to complete before their visit

### For each assessment you add, you will need the following information:

- ☐ Title: \_\_\_\_\_
- ☐ Link: \_\_\_\_\_
- ☐ Language (English or Spanish)
- ☐ 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). By default, your links will apply to all age groups unless you tell us otherwise. You will use the age-visit selection tool included in the customization process to indicate which age-visits your additional assessments apply to.
- ☐ Special instructions families need to access the assessment link you add to your WVP (e.g., a password): \_\_\_\_\_

## Step 3: (Optional) Add links to additional resources you want to share with families in their Well Visit Guide

You can add links to resource materials to be shared with families (e.g., local resources to address social needs, special tip sheets from your practice). You can assign links to specific visit ages and specify language (English or Spanish). These links and resources will be prominently featured on the family’s Well Visit Guide with directions from you.

### PAUSE AND CHOOSE:

**Before you decide what resources to share** with families, review the resources for families you already have access to through the WVP. **Click here** to review age-specific Family Resource Sheets for all anticipatory guidance/educational topics included in and risks assessed by the WVP. These Family Resource Sheets are embedded into family Well Visit Guides and provider Clinical Summaries as hyperlinks and based on each family’s unique responses and selected educational priorities.

☐ I have additional **resources or materials** I want to share with my families.

For each resource you add, you will need the following information:

- ☐ Title: \_\_\_\_\_
- ☐ Link: \_\_\_\_\_
- ☐ Language (English or Spanish)
- ☐ Age visit(s) during which resources will be shared (first week, 1, 2, 4, 6, 9, 12, 15, 18-month, 2, 2 ½, 3, 4, 5, 6-year visits).  
By default, your links will apply to all age groups unless you tell us otherwise
- ☐ Instructions for families to use: \_\_\_\_\_

#### Step 4a: Choose if you would like to opt out of having a data dashboard to access family data, and how to receive and be notified of new *Well Visit Guides* and *Clinical Summaries*

##### 1. Opting Out of a WVP Data Dashboard

You can opt-out of a WVP Data Dashboard and choose not to see or use family responses to the Well Visit Planner (WVP). You can activate it later to receive family data if you change your mind.

##### BEFORE YOU DECIDE

Please review examples of the family **Well Visit Guide** and provider **Clinical Summary** before you decide not to receive these WVP results in your WVP Data Dashboard. If you chose to opt out of receiving family data and then later activate your WVP Data Dashboard, **you will not have access to the WVGs and CSs** from your customized WVP that were completed **during the period your WVP Data Dashboard was deactivated**.

☐ **I WANT** a WVP Data Dashboard to receive family data

**Continue to #2 below**

☐ **I DO NOT WANT** a WVP Data Dashboard to receive family data

**Continue to #2 below** if you would like to receive notifications after families complete your customized WVP, **then skip #3 and Step 4b**

##### 2. (Optional) Choose how to be notified when new Clinical Summaries are added to your WVP Data Dashboard.

By default, you (primary account holder) will receive notifications to the email provided during registration. These notifications will be sent one time per day on days when new Clinical Summary and Well Visit Guide reports are available after families complete your customized WVP. Additionally, you will receive weekly notifications if there are unopened Clinical Summaries from the past month.

☐ I want to receive notifications after every WVP completion instead of the daily notifications described above.

If you (primary account holder) do not wish to receive any email notifications about completed WVPs, you can select an additional account holder to receive the notifications instead. If you did not add any additional account holder when registering for this account, go to the "Manage Account Holders" section of your COE Dashboard and add them there.

☐ Send the email notifications to additional account holder(s) added below **in addition to the email used to register for this account**.

☐ Send the email notifications to additional account holder(s), and **not to the primary account holder** (you).

**Email** to send notifications to: \_\_\_\_\_

**3. (Optional) Select other ways you want to ask families to share their Well Visit Guide and/or Clinical Summary with you.** In addition to being uploaded to your WVP Data Dashboard, families will be encouraged to save Well Visit Guides and/or Clinical Summaries to their phone and/or to print their Well Visit Guide and bring it with them to their child's well visit.

☐ I want to encourage families to email me their Well Visit Guide and/or Clinical Summary

**Your email address:** \_\_\_\_\_

☐ I want to encourage families to upload the Well Visit Guide and/or Clinical Summary to their child's Patient Portal

**Link** to your Patient Portal: \_\_\_\_\_

**Instructions** for families to upload their Well Visit Guide and/or Clinical Summary to their Patient Portal  
(this must be a PDF document): \_\_\_\_\_

#### Step 4b: (Optional) Choose if you would like to share *Well Visit Guides and Clinical Summaries* with other providers

Primary account holders who wish to share WVP data must (a) name each other or (b) add the same additional account holder (staff/coordinator or a member of the team) to their account to enable data sharing between the primary account holders.

**Provider/Primary account holder** who you want to share Well Visit Guides and Clinical Summaries:

☐ Full name: \_\_\_\_\_

☐ Email: \_\_\_\_\_

You (primary account holder) can add additional account holders (staff/coordinator or member of your team) on your COE Dashboard (Manage account holders tab) after you complete WVP customization. You and the other primary account holder must add each other to be able to share Well Visit Guides and Clinical Summaries directly with each other.

**About Family Consent:** Families actively consent to share their Well Visit Planner data with you when they complete the tool. However, to share this data with other providers or partners be sure the consent form you currently use with families allows you to do so.

## Congratulations!

You are ready for WVP customization!

Please visit your **Cycle of Engagement Dashboard** and click "**Customize WVP**" to customize your WVP using the information you provided on this worksheet.

#### After customization, **TEST YOUR WVP!**

**We recommend** that you click on your customized WVP family website link, complete the WVP as if you were a family and view the family Well Visit Guide and your Clinical Summary in your WVP Use Portal data dashboard. If you need to make changes, you can do so using your WVP Use Portal options.

## On your WVP Use Portal you can:

- Get and try out your customized WVP family website link and QR code
- Create a customized family flyer where you can add your link/QR code and logo
- Access the Quick Start Guides and resources to implement the WVP approach to care that includes:
  - ✓ **Create your plan:** Access the WVP implementation roadmap resources
  - ✓ **Engage your families:** Get family engagement resources (family flyers, visit room posters, email, voice, text invitation scripts, handout postcards)
  - ✓ **Get results:** Access your data dashboard to get Well Visit Guides and Clinical Summaries and access Family Resource Sheets and other resources on your Clinical Summary
  - ✓ **Partner in care:** Conduct comprehensive, guidelines-based Personalized Connected Encounters to optimize time during visits to focus on the family's agenda
  - ✓ **Keep improving:** Use our Post Visit Survey to assess how using the WVP is going for you so we can assist you in real time. You may also implement the Online Promoting Healthy Development Survey to improve quality of care you provide for families and children.
- Update and manage your customized website
- Add **additional questions and/or assessments** using the “Add Additional Questions and Assessments” left-hand navigation bar
- Add or update additional resources you want to share with families.

**Please note:** the next time you login to your COE Dashboard, you can access your WVP Use Portal and will not see these customization steps.

# Online Promoting Healthy Development Survey (PHDS)

## Customization Instructions and Preparation Worksheet



### Step 1: Create a simple unique URL name for your Promoting Healthy Development Survey (PHDS) family website

1. Create a short, recognizable, and easy to remember name for your customized PHDS link (e.g., “DrJones,” “PromisePediatrics”).

- Families you serve will use this customized link to access your PHDS family website.
- You will also get a QR code families can scan to access your customized PHDS.
- Please note that your URL “name” will also serve as your “Provider ID code,” which families can also type in to access your customized website from the PHDS public use family website (<https://www.onlinephds.org>).

You will receive a toolkit on how to engage families once you customize the PHDS and get your Use Portal.

#### REQUIREMENTS:

- Your customized PHDS name **should not include any spaces or special characters** (e.g., ! " # \$ % & ' ( ) \* + , - . / : ; < = > ? @ [ \ ] ^ \_ ` { | } ~).
- **Do not add a web domain extension**, such as .org or .com.
- **You can include up to 25 characters.** Shorter is better! Pick something that is recognizable and easy for families and for you to remember.

☐ Your short name \_\_\_\_\_ (onlinephds.org/YourShortNameHere)

2. Provide 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 PHDS homepage (e.g., “Welcome to the Online Promoting Healthy Development Survey (PHDS). Dr. Jones from Promise Pediatrics invites you to complete the PHDS...”).

☐ Name of child health professional: (e.g., Dr. Jones): \_\_\_\_\_

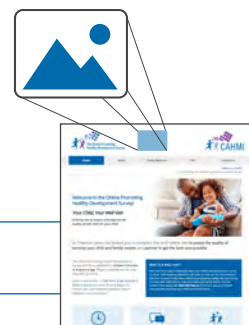
☐ Name of the practice/organization name (e.g., Promise Pediatrics): \_\_\_\_\_

3. (Optional) Add a logo or picture you want to show at the top of your Online PHDS family website

#### REQUIREMENTS for logos or photos:

- The image file you upload must be in one of the following file formats: jpg, jpeg, gif, png. The file must be smaller than 0.5 MB, or 500KB.

☐ I have found and saved a logo or photo to access when I customize my PHDS website.



## Step 2: (Optional) Add links to additional resources you want to share with families in the family Feedback Report

You can add links to resources you want your families to see and use (e.g., parent tip sheets, Growth Charts for Parents (KidsHealth). These links will be prominently featured on the PHDS Family Feedback Report with directions from you.

☐ I have **additional resources or materials** I want to share with my families.

**For each resource you add, you will need the following information:**

☐ Title: \_\_\_\_\_

☐ Link: \_\_\_\_\_

☐ Language (English or Spanish) \_\_\_\_\_

☐ (Optional) Instructions for families to use this resource : \_\_\_\_\_

## Step 3: Choose how to receive your Online PHDS Aggregate Reports

Please provide the **email address** where you would like to receive notifications about the availability of your aggregate reports. **This should be the email of the primary COE account holder or the email of a person the primary account holder gave account privileges to.**

☐ Email address \_\_\_\_\_

**If you leave this blank,** we will send emails to the email address you provided when you registered for your COE account. You can generate an aggregate PHDS report any time on your PHDS User Portal after 25 caregivers/parents have completed the PHDS.

### COMING SOON: Apply for Professional Credits

Please check the appropriate boxes if you are interested in using the Online PHDS to obtain professional credits. We will notify you when these functions become available on our website.

- ☐ Renew Maintenance of Certification (MOC, Part 4)
- ☐ CME credits
- ☐ Optimizing meaningful use of EMR and/or Patient Portals

## Congratulations!

You are ready for Online PHDS customization! Please visit your **Cycle of Engagement Dashboard** and click "**Customize Online PHDS**" to customize your Online PHDS using the information you provided on this worksheet.

### DO THIS FIRST!

Click on your customized PHDS family website link, complete the PHDS as if you were a family caregiver and view the family Feedback Report generated for families. If you need to make changes to your customization settings, you can do so using your PHDS Use Portal options.



## On your PHDS Use Portal you can:

- Get and try out your customized PHDS family website link and QR code
- Access the Quick Start Guides and resources to implement the PHDS that includes:
  - ✓ **Create your plan:** Access the COE implementation roadmap resources
  - ✓ **Engage your families:** Get family engagement resources (family postcard examples, visit room poster examples, email, voice, text invitation scripts, etc)
  - ✓ **Get results:** Generate your Online PHDS Aggregate Quality Report after at least 25 families complete the PHDS. Use resources provided to help you improve.
  - ✓ **Partner in quality:** Use aggregated quality report to address priority areas for improvement and track changes over time
  - ✓ **Keep improving:** Encourage families to complete the Online PHDS when you are ready for more quality information. Continue using the WVP before each well visit to improve the quality of care they receive.
- Update and manage your customized PHDS website.
- Add or update additional resources you want to share with families in their PHDS Feedback Report
- Obtain professional credits (*coming soon*).

**Please note:** the next time you login to the Cycle of Engagement Dashboard, you can access your PHDS Use Portal and will not see these customization steps.