

WORKING THE PERSONALIZED HEALTH PLAN – FOLLOW-UP

Patient Name:

Date:

Current Healthy Days Index #:
assess after 30 days

HOW ARE THEY DOING GENERALLY?

Review vision and goals. – *adjust in EHR as needed*

Any life events since last contact? (*body & external, behavioral & lifestyle, social & emotional, environmental and SDOH*)

REVIEW SMART GOALS:

Progress and/or updates on SMART steps

Challenges or issues making progress since last meeting (*temporary or ongoing indicating need for further navigation and coaching*)

Priorities/SMART steps to work on before next follow-up meeting

NAVIGATION AND/OR COACHING NEEDS:

Navigation – appointments, information, connections

Coaching – tracking, methods for accountability, problem-solving, identifying next steps