

Client Guide to Healthie: Overview

Welcome to Healthie! This is your all-in-one patient portal for working with your provider to achieve your health and wellness goals.

Learning how to use a new platform can be overwhelming at first. Thankfully, we have created this guides as a one-stop shop for you to learn how to use Healthie to make progress with your provider and keep yourself accountable.

Here are some of the features you might use with your provider:

Goals

- Set goals within the platform
- Include a goal title, description, frequency, start & end date, and subgoals
- Check off goals from the app or platform to keep track
- Three days of achieving goals = a streak!

Metrics

- Add metrics updates based on what you and your provider have decided to track
- Check on your progress using graphs
- Sync your Fitbit to track your steps too!

Photo Food Journal

- Log your meals in real-time by snapping or uploading photos
- Indicate different metrics about your meal based on what you and your provider have discussed is important to track
- Get feedback from your provider in-between appointments

Intake Forms

- Fill out your intake forms virtually (on your phone or computer)
- Get reminders from your provider when you forget to fill out a form

Calendar

- Schedule, re-schedule, or cancel appointments with your provider
- Keep track of upcoming (and past!) appointments
- See your provider's availability

Programs

- Programs may be included in a package you've purchased from your provider
- Go through modules that include videos and other resources to help with your nutrition education

Packages

- Purchase packages straight through the platform so you never run out of credits to meet with your provider!

Healthie Video Chat

- Meet with your provider through our video chat feature when you can't make it for an in-person appointment
- Easily participate in the meeting from your phone or laptop

Using the Goals Feature

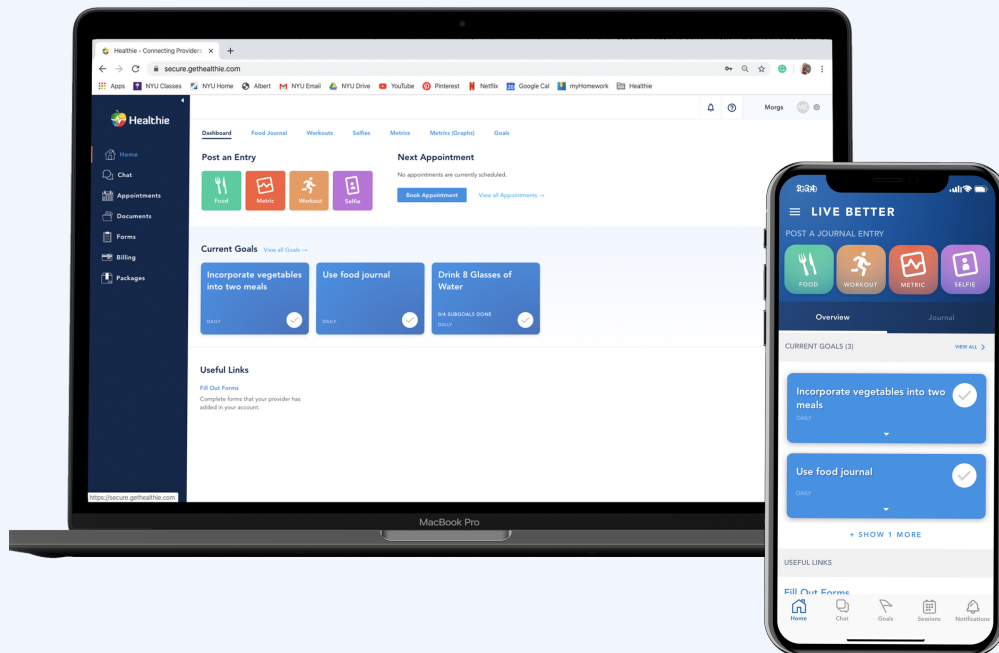
You can access the goals feature from either the mobile app on your phone or by logging in on the desktop website.

From the website:

1. When you log in using the Healthie portal, your goals will automatically appear on your homepage dashboard.
2. If you've completed that goal, you can just check it off from the dashboard.
3. Click on "View All Goals" to bring up the goals homepage. You can also access this on the top menu bar by selecting the goals tab.
4. To create a new goal, go to the upper right hand corner and select "Create goal."
 - a. Give your goal a title, a frequency, a start and end date (or make it indefinite), and a description.
 - b. You can also add subgoals - i.e. if your goal is to drink 8 glasses of water a day, your subgoals could be "drink three glasses before lunch, drink three glasses before 3pm, and drink two glasses after dinner."
5. Now, this new goal will appear on your goals page.

From the mobile app:

1. When you log into the app, your goals will pop up on the dashboard.
2. Same as on the desktop, if you've completed the goal for the day, just check it off from your homepage.
 - a. You can hit the down arrow to see the goal description and check-off subgoals.
3. In the bottom menu bar, you can find the goals homepage.
 - a. Here, you can see your goals over the past week and scroll through the calendar.
4. To create a new goal, you can click on the "+" sign.
 - a. Give your goal a title, a frequency, a start and end date (or make it indefinite), and a description.
 - b. You can also add subgoals - i.e. if your goal is to drink 8 glasses of water a day, your subgoals could be "drink three glasses before lunch, drink three glasses before 3pm, and drink two glasses after dinner."
5. The new goal will appear on your goals page.



Using the Photo Food Journal Feature

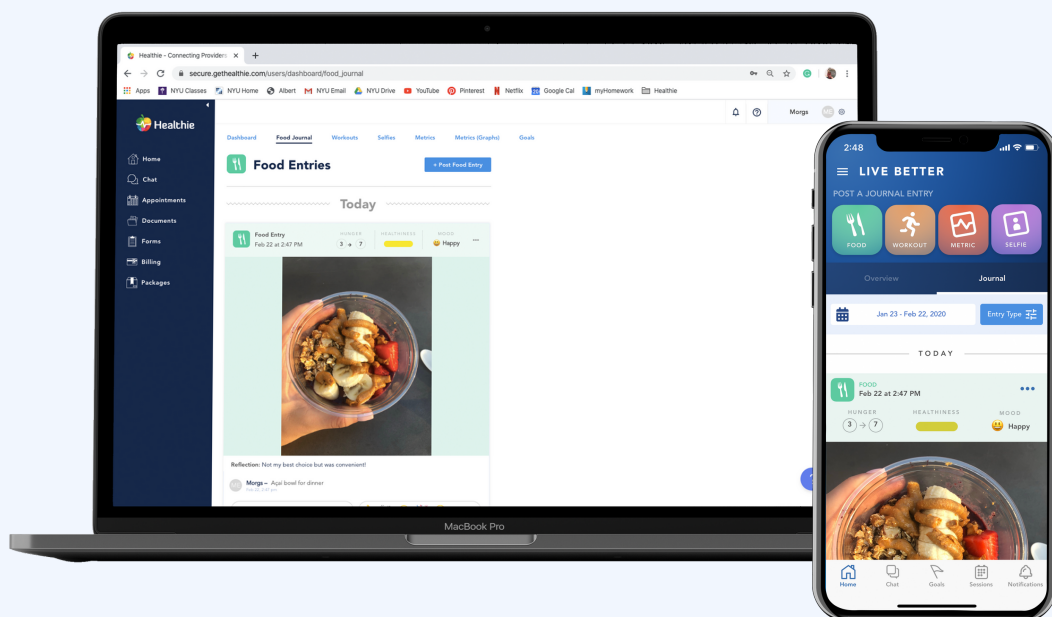
You can access the goals feature from either the mobile app on your phone or by logging in on the desktop website. It's probably easiest to use it from your phone, so you can snap photos of your food and upload in real time.

From the website:

1. From your client dashboard, you can create a new food journal entry by clicking the green "Food Journal" button in the left hand corner.
2. You can also post an entry by clicking on the "Food Journal" option in the top menu bar. This will bring you to all of your entries as well, so you can review comments and reactions from your provider.
3. When you post a new food entry, there are different settings your provider can add for you to fill out. Your provider chooses which ones, but your options could include:
 - a. Add a photo of your meal
 - b. Add a comment describing what it is
 - c. Add your thoughts after eating
 - d. Pre-Meal Hunger
 - e. Post-Meal Fullness
 - f. Mood
 - g. Perceived Healthiness
 - h. Meal category
4. Once posted, your provider can reply with comments or emoji reactions to your meal before discussing at your next appointment.

From the mobile app:

1. When you login to the app, the same green button to post a food journal entry is in the left corner on your dashboard.
 - a. To see all of your previous entries, click on the "Journal" button below the top menu bar.
2. The same settings are available on the phone.



Using the Calendar

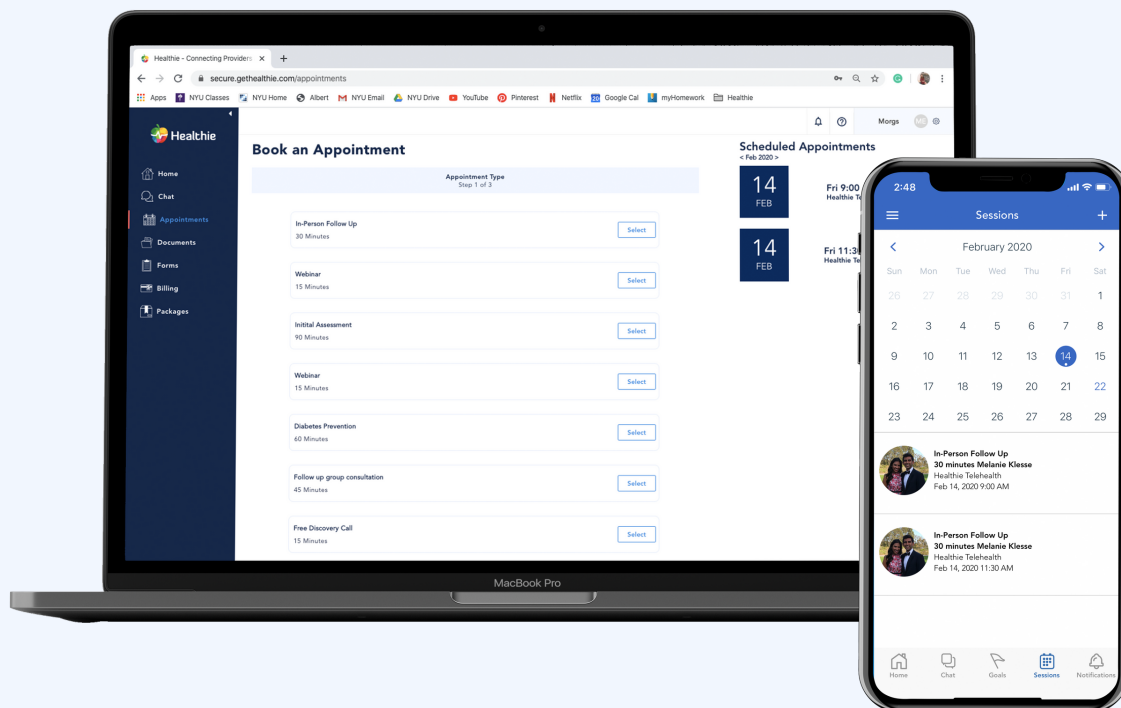
You can access the goals feature from either the mobile app on your phone or by logging in on the desktop website. Some providers give you the option to book your own appointments.

From the website:

1. You can see your currently scheduled appointments on the right hand side of your client dashboard.
2. Click on the "Appointments" tab on the left hand menu bar.
3. This will bring up all the appointment types available from your provider.
 - a. This will also show all of your current scheduled appointments as well.
4. Select your appointment type to bring up the calendar. Click on different days to see available appointment times.
5. Once you've selected the time, it will prompt you to select a location and book your appointment.

From the mobile app:

1. You can see your currently scheduled appointments from your dashboard.
2. Click on the sessions tab in the bottom menu bar to bring up the calendar.
 - a. Any date with a blue dot means there is an appointment scheduled.
3. Click on the blue "+" to schedule an appointment with your provider.
4. Press the button to select an appointment type, then your contact type, then location.
5. Choose your time, and click "create session" to finish booking.

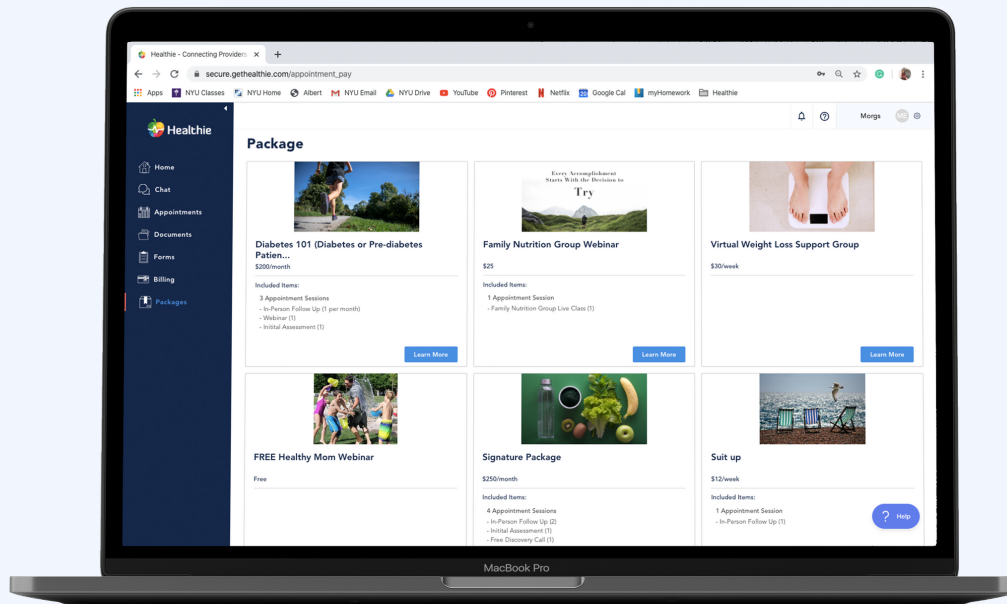


Using the Packages Feature

You can access packages from the desktop platform.

From the website:

1. Click on the "Packages" tab on the left to access the packages available from your provider.
2. Click on "Learn More" of the packages to see the details and purchase.
 - a. It should show you how many appointments that you get in the package, and what appointment types it includes.
3. Simply enter your payment information to purchase the package.



Using the Metrics Feature

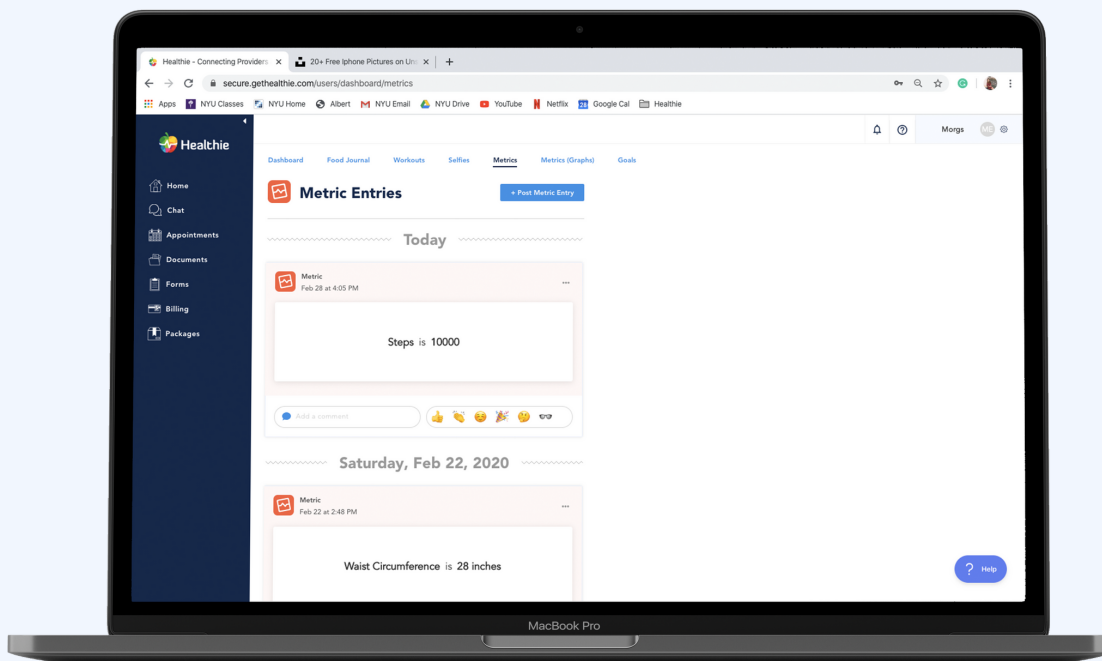
You can access the metrics feature from either the mobile app on your phone or by logging in on the desktop website.

From the website:

1. You can add a new metric by clicking on the red “Metrics” button on your dashboard.
 - a. Your provider chooses what metrics you can track on Healthie, you can choose from the ones available in the drop-down menu.
2. To see all of your metrics, click on the metrics tab on the top menu bar.
3. You can also add a new entry from this page.
4. You can also see your metrics tracking using graphs, from the “Metrics (graphs)” tab on the top menu bar.

From the mobile app:

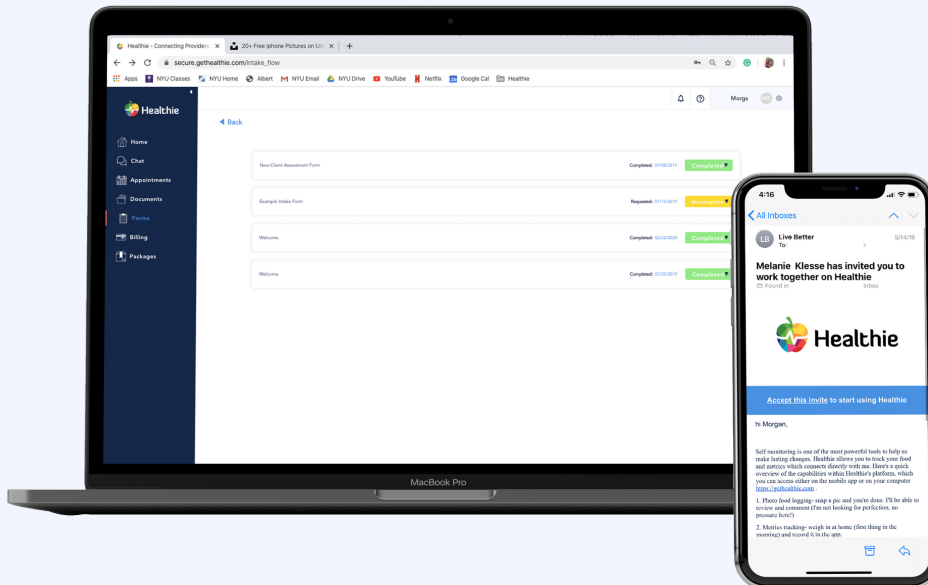
1. You can add a new metric by clicking on the red “Metrics” button on your dashboard.
2. Choose from the drop-down bar what metric you are logging
3. Enter the amount, and a comment if you so choose. Hit post to add to your metrics tracker.
4. To view your metrics entries, you can click on the “Journal” tab on your dashboard.



Filling Out Intake Forms

When you sign up with Healthie, you will get an email from your provider including intake forms to fill out prior to your initial appointment.

1. When you receive the invite email, click on “Accept Invite” to get started filling out the forms.
2. If you aren’t able to fill out all the forms at that time, you can go back later and finish them if you click on the “Forms” tab on the left menu bar.
3. This tab will show you what forms you have completed filling out, which ones are incomplete, and which ones you haven’t.
4. Just click on the form to fill it out.



Using the Programs Feature

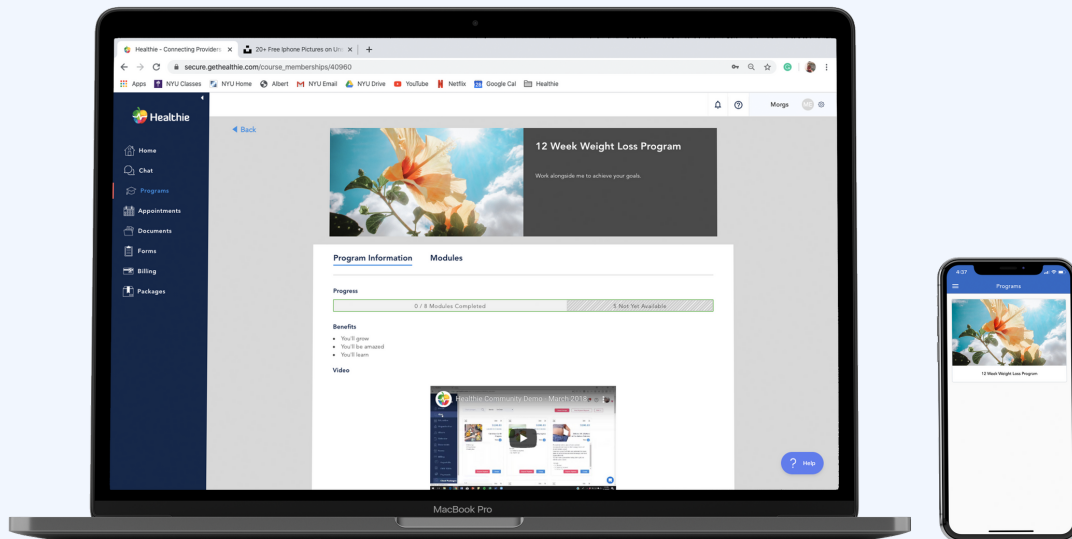
If your provider offers programs, they can choose to enroll you themselves; or, if you purchased a package that includes a program, you will be automatically enrolled in that program. You can access programs from both the desktop platform and the mobile app.

From the website:

1. The programs feature is accessible from the lefthand menu bar.
2. When you open up the program dashboard, you will see all of the programs you are currently enrolled in.
3. Click view to look at or work on any specific program.
4. Scroll to the bottom to see the modules you need to complete, and hit "Start" to begin working.

From the mobile app:

1. The programs feature is accessible by hitting the lined menu button in the top, left-hand corner of your dashboard, and selecting "Programs" from the lefthand menu bar.
2. Once you select this, you can see all of the programs you are currently enrolled in.
3. Just tap on the one you want to work on.
4. You can click on the modules and complete them right from your phone.



Using the Video Chat Feature

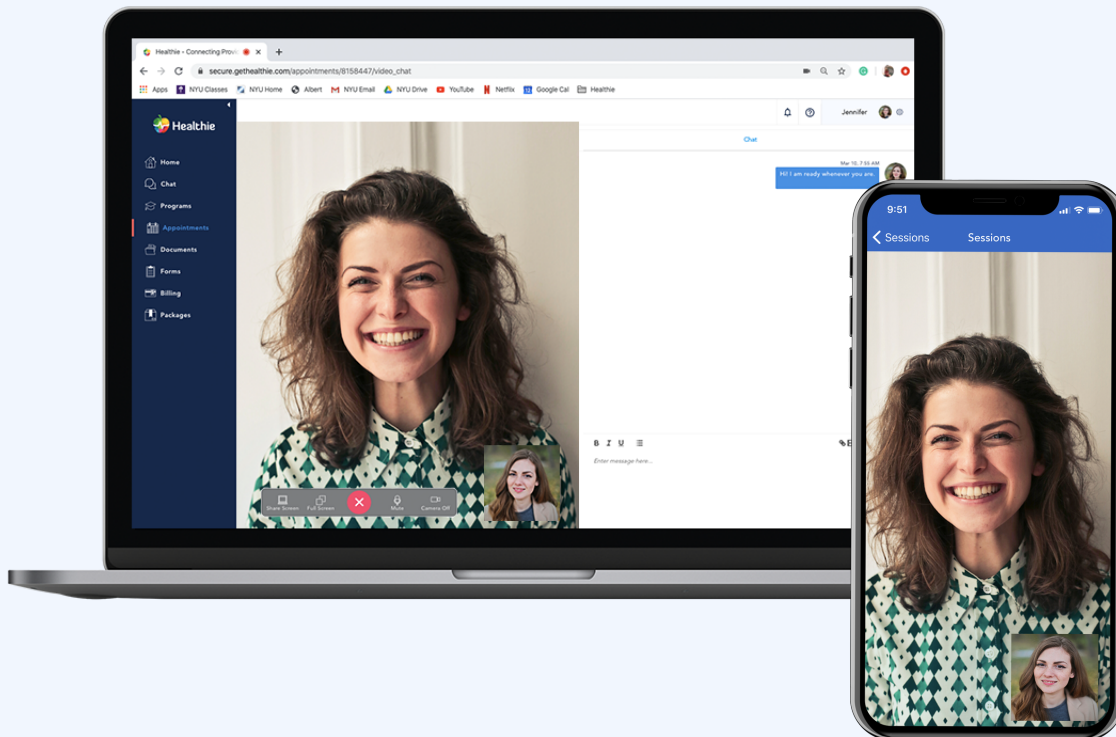
If you have virtual appointments with your provider, you can hold those from either the mobile app or the computer.

From the website:

1. If you are to have a virtual appointment with your provider, they will set the appointment as such.
 - a. It will say "Healthie Telehealth" under the appointment details if it is a virtual appointment.
 - b. There will also be a "Video Link" to click on when it is time to join the appointment.
2. When you click on that video link, it will bring you directly to the video chat platform. You can wait there until your provider joins and you can start your appointment!

From the mobile app:

1. You can see your next scheduled session right from the dashboard on your mobile app.
 - a. Like on the website, the appointment will say "Healthie Telehealth" if it is to be a video chat appointment.
2. Click on the appointment to open up the details.
3. Click on "Start Video Chat" to join the appointment.
4. From there, you can wait for your provider to join your video chat.



Benefits of Using Healthie with your Provider

Working with a new healthcare provider can seem daunting at first, especially if it comes with new technology. However, in the long run, using Healthie will help you build a relationship with your provider, keep you on track, and achieve your goals.

1. Demonstrates your progress over time

Within Healthie, there are many features you can use to track your progress with your provider. When you use our goals feature, you can set realistic and achievable goals, and monitor them through the mobile app. Every time you add a new metric entry (weight, steps, blood sugar), it goes on a graph so you can see how you're doing over a long period of time. Having these features in place will help keep you motivated, because you can see your improvements on the screen, even if you're not feeling them in person.

2. Keeps you accountable

Working with a healthcare provider is great, because you have someone to support you along your journey. When you use Healthie with your provider, you get another layer of accountability that wouldn't be present when just meeting with them each week. Healthie allows your providers to check in on you in-between appointments, by answering questions using the chat feature and commenting on food journal entries and metrics in real-time. You have constant support through the platform that will help you stay on track day-to-day, and achieve your long term goals.

3. Convenience!

Using Healthie is incredibly convenient for both you and your provider. Everything you need is accessible through the mobile app: scheduling appointments, your photo food journal, chat with your provider, your programs, and the ability to join virtual telehealth appointments. You can access the app on vacation, at work, or in a coffee shop with no extra trouble. The days of lugging around notebooks to journal your meals are long gone...

