Delivery Guide

In-Person Steps:

1. PHONE
   - Call client one day before scheduled appointment. For Monday appointments, call on Friday.

2. PREP for SESSION
   - Refer to LOG spreadsheet to reference what session should be delivered.
   - Refer to the IN-PERSON MANUAL
   - Refer to client’s blue binder for last week’s action plan. You may want to pre-fill the client’s Action Plan Tracking Sheet and a new Action Plan for Healthy Eating, as well as a new Action Plan for Physical Activity.
   - Retrieve session handouts (according to the session you plan on delivering).
   - Provide healthy snack if possible, and water.
   - Other items you may wish to prepare in advance:
     - Poster with written session details.
     - Next appointment reminder time/date.
     - Props. Some sessions refer to measuring cups or food items.

3. SESSION GUIDELINES
   - Weigh client and update client’s blue binder with date/weight figures along appropriate session.
   - Begin by reviewing and completing client’s Action Plan Tracking Sheet.
     - About 10 minutes
   - Follow session topic and review handouts according to manual.
     - You may need to redirect, but use motivational interviewing techniques to explore topics.
     - About 30 minutes
   - Draft new Action Plans (one for Healthy Eating and one for Physical Activity)
     - Does client want to modify last week’s action plan? Are they inspired to try something new based on today’s topic?
     - About 10-20 minutes
   - Questions from clients?
   - Confirm next appointments; provide reminder card.
   - Make a copy of client’s Action Plan Tracking Sheet and new Action Plans. Keep copy in their blue binder and provide client with originals including session handouts.

4. POST-SESSION.
   - Complete progress note
   - Store updated blue binder (insert documents from session).