# 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.**
  - *How did your action plan go? Were they successful? Any obstacles?* Explore.
  - 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).