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**Welltok General Information**

* For each new benefit cycle for Welltok contracts (American Water, GPI, Dollar General, and eventually Ohio Health), for Returning Clients, please double-check that they have joined (or clicked through) the Coaching ActionCard.
  + This is the action that triggers the sessions to show up correctly in their CafeWell profile.

**Welltok: Dollar General**

* **Dollar General Tobacco**
  + Tobacco Coaching Program Registration Deadline: January 31, 2022.
    - Reminders will be sent out by Welltok weekly in the first 3 weeks of January, and then multiple times in the last week.
    - Client must have a registration date of 1/31/2022 or prior. 1st session can have a scheduled date that is after the deadline.
  + Incentive is $480 premium credit which is paid out 4th quarter 2022.
    - It is required to complete 4 coaching sessions that are no more than 45 days apart, and the first session must be completed within 45 days of registration.
  + They are allowed 8 coaching sessions total: 4 required for incentive and 4 optional.
    - Optional appointments do not have to be completed within that 45-day window.
* **Dollar General Well-Being**
  + NEW this cycle: clients receive 45 points after completing each session (instead of having to complete all 4 to receive 180 pts).
  + Clients are allowed 4 sessions.
  + If there are unique instances of DG clients seeming to be misclassified (Tobacco versus Well-Being), reach out to Sabryna directly with details.

**2021-2022 Dollar General Best Practices**

* Tobacco: Schedule coaching sessions within 4 weeks or less.
  + This will support adherence to the 6 weeks, 3 days (45-day) requirement between sessions.
* Set your coaching boundaries:
  + Empower your clients to contact CafeWell Customer Service for help. You can screenshot the SOAP history, if desired, to support your client. But encourage them to contact CafeWell C.S. for calls that do not show on their profile.
    - **DGWellsupport@cafewell.com or #833-628-0950**
  + Empower your clients to contact Dollar General HR Shared Services using the following number:
    - **855-ASK DG HR (855-275-3447).**
  + “I am your coach. I am your support to create healthy behavior change, so you can find ways to improve your well-being that will work best for you in your life.”

**Welltok: GPI**

* GPI Non-union new benefit cycle is 9/1/21 – 7/31/22.
  + Returning clients do need to ensure they have “joined” new Coaching Action Card (old one shows as ‘expired).
* Please note the different incentives and call cadence for the two groups of employees, Non-union and Union.
  + Non-union: 160 pts (80 spouse) after completing 4 coaching sessions; call cadence is flexible – at least 1 week between calls.
  + Union: $100 per quarterly coaching call; spouse has same incentive.
    - **A new Coaching ActionCard is populated each quarter. Client MUST join new card each quarter to generate incentive.**
    - **Must adhere to quarterly coaching sessions (e.g., 1/1-3/31; 4/1-6/30; 7/1-9/30; 10/1-12/31).**
* Account Manager: Sabryna Liddle

**Welltok: Ohio Health**

* Anticipated Launch Date: 1/17/2022
* Details to come
* Account Manager: Sabryna Liddle

**Welltok: American Water**

Like Dollar General, American Water will offer Well-Being and Tobacco Wellness Coaching programs, but the American Water wellness program is much simpler! The way American Water Clients schedule calls is like Dollar General; they have to log in through the Welltok Action Card and schedule their first call through there:  <http://mywellness.amwater.com/>.  After your first call, you can schedule your next calls during your coaching sessions.

It is open to all coaches and sent an into email yesterday, Dec 28 with the bb attached.

Account Manager: Mary Walinchus

* **American Water Well-Being**
* Shows up in Admin as Welltok: American Water
* **Start/end date**: January 1, 2022 – December 31, 2022
* # **Sessions**: They are allowed 4 sessions in which they will receive 10 points per coaching session.
  + There is a maximum of 50 points allowed to **be paid out per quarter** for the entire wellness program. (1 point = $1)
  + They also have a quarterly Safety Gateway activity to earn rewards.
  + Points do not carry over from one quarter to the next.
  + Knowing this, clients should be mindful of how many coaching sessions they complete during any one quarter. If a client has 1 call in a quarter, it is 10 point, so they will do their other activities to earn the remainder 40 pts. Remember it is their responsibility to keep track
* **Scheduling Calls**: <http://mywellness.amwater.com/>
  + Like Dollar General, they have to log in through the Welltok Action Card and schedule their first call through there.
* The deadline to complete the HRA is December 31, which is the same deadline to complete the calls.
* **Eligibility:** Employees and Spouses are eligible for general coaching but only employees are rewarded.
* **American Water Tobacco <NEW>**
* **Start/end date**: January 1, 2022 – December 31, 2022
  + # sessions: They are allowed 4 coaching sessions for which they will receive 15 points per coaching session and 4 optional sessions.  The 4 optional sessions should be communicated as a reward for completing the 4 incented sessions.
  + There are **not** any restrictions or rules to when your client schedules their calls! Although, as always, it is best practice to have at least one week between sessions.
  + **~~Incentive~~**~~: 15 points per session.~~
  + There is a maximum of 50 points allowed to be paid out per quarter for the ​entire wellness program.
    - (1 point = $1)
    - They have a quarterly Safety Gateway activity to earn rewards.
    - Points do not carry over from one quarter to the next.
    - Knowing this, clients should be mindful of how many coaching sessions they complete during any one quarter. For example, if the employee does 4 tobacco coaching sessions in one quarter (for a total of 60 points), they will only receive 50 points from coaching because of the quarterly maximum.
  + **Scheduling Calls**: <http://mywellness.amwater.com/>
  + Like Dollar General, they have to log in through the Welltok Action Card and schedule their first call through there.
  + The deadline to complete the HRA is December 31, which is the same deadline to complete the calls.
  + **Eligibility:** employees and spouses who indicate that they are smokers on their HRA are eligible for Tobacco Cessation Coaching, but only Employees (self-attested as smokers on the HRA) are rewarded.

**MINES**

Same as last year, so far

Reminders

* + **Be sure to Check benefit expiration date within Info section (this is typically updated within 24 hours of client registration) in the INFO button**
  + **Client must reach out to MINES to extend authorization when it is expired or close to expiring**
  + Ask each NEW MINES client, “What company do you work for?” and document answer in the “S” section of the SOAP note. We are specifically looking for City of Fort Collins (FOCO)
* Account Manager: Mary Walinchus
* **Mines & Associates** – 4 sessions (this includes City of Fort Collins) through expiration date. This is the majority of Mines clients.
* **Mines & Associates ACEP** – 3 sessions for these ER physicians through expiration date
  + 128 page resource guide is listed in Bulletin Board (BB)
* **Mines & Associates Team** – 5 sessions annually (Mines employees)

**Plante Moran**

* We are excited to continue to work with them. Coaching is limited to the PM employees on the spreadsheet sent to PM coaches on 9/30/2021.
* Coaching approved through 12/15/2022!
* They are quarterly sessions
  + We can only coach employees who have completed at least one session in 2021.
  + NO reaching out to any PM employees who have not engaged this year.
  + Please review the list and feel free to contact those on the list to do a 1st quarter 2022 coaching session.

**SCA**:

* New registrations are still trickling in!
* Q4: December, January, February
* **Incentive**: $75 wellness bonus per quarter ($300 total for the year) for completing quarterly coaching calls  
   **Deadline for Calls**: Last day of each quarter
* **Eligibility:** Employee only
* **Scheduling calls**: Log in to www.uscorporatewellness.com
* Account Manager: Mary Walinchus

**LifeWork Strategies:**

Account Manager: Mary Walinchus

Provider of EAP and Wellness services through Adventist HealthCare (AHC).

**AHC**

* **# sessions:**  Min of 4 coaching sessions to receive credit.
  + Can have as many coaching sessions in a year as needed (up to about 15 sessions).
* **Start/end date**:  9/16/21 - 9/15/2022
* Reach out to your clients from last year to let them know there is the health coaching option as one of their wellness activities and if they would like to schedule a call.

**Condition Management Program  (an option of the AHC health coaching option)**

* 12-week program with 6 coaching sessions.
  + Each quarter, a new cohort of each CM will start.
  + Diabetes or Weight Management, Tobacco Cessation, Hypertension <NEW>
  + After the program has completed, client can still have as many coaching sessions as needed  (up to 15 about sessions).
* P*articipants must complete the program in its entirety* to receive credit.
  + If they don’t finish the program, they can still receive credit if they complete 4 calls.
* Please reach out to Mary if the client registered later in the cohort or are having challenges scheduling calls with client.

**RPM Development Group** High quality affordable housing   160 employees

* **Start Date**:  March 2022
* **End Date**:December 1, 2022
* **#** **Sessions:  8**
* **Incentive**:  $100
* Low activity

**EAP**

* **# sessions:**6 calls per calendar year Jan-Dec
* **Incentive**: None
* There are 12 different companies that work with the EAP.
* Low activity

**Concern Health <NEW>**

* Anticipated Launch Date: 1/17/2022
* **Contract Year Start Da**te: January 1 2022
* **Benefit year Deadline**: Varies, see expiration date
* **Deadline for calls**: Click on Info icon to find each client’s “Expiration Date”
* **# session**s: 4, unless otherwise noted
* **Incentive**: none
* **Call Cadence**:  at least 1 week apart
* **Eligibility:** Employee only
* **Scheduling calls:** Client will log in directly to schedule. [www.uscorporatewellness.com](http://www.uscorporatewellness.com)
* Account Manager: Mary Walinchus
* Overview: An EAP group consisting of many companies (they are starting with 20 healthcare companies) with more of a focus on Emotional/Mental The thing that sets them apart is that most clients will not be seeking coaching for topics such as healthy eating, exercise, weight management as a primary goal, but more as a secondary goal (or strategy) for something like stress management.  Ex. Exercise/activity might be an idea to help with stress relief.
* Concern Health is similar to Mines and like most EAP’s, members will contact the EAP service and then from the initial assessment, they will be referred to USCW.   They will be assigned an authorization code and expiration date and will have up to four sessions!

**Missed Call Policy**

**1st Missed Appointment**

1. Touch 1: Leave voicemail – note any relevant deadline in message.
   1. Optional action: Text client.
2. Select the “Missed Appointment” option on the calendar.
   1. Doing so will trigger the site to immediately send out an **automated Missed Call emai**l.
   2. If they “reply” to this email, it will come directly to your USCW email inbox.
   3. USCW will also be tracking Missed Call data to share with individual contracts when appropriate.
3. Touch 2: Leave voicemail or text stating the deadline again.
4. Touch 2 NOT required for contracts where coaching is a choice for points.

**2nd Missed Appointment within a Deadline Timeframe**

(Examples: contracts with quarterly requirements, SARH 2 call requirement deadline, or Dollar General’s Tobacco Cessation requirement to engage within 45 days of registration or last session)

1. Touch 1: Leave a voicemail (E.g., “Sorry we did not connect today for your scheduled coaching session. I will not be reaching out again about scheduling or deadlines. I will leave it in your hands if you choose to continue with the program and meet the deadlines. Please feel free to …click back through the action card…(or log in to USCW, whatever action is relevant to the contract) to access the calendar. Have a great day!”)
2. Select the “Missed Appointment” option on the calendar.
   1. Doing so will trigger the site to immediately send out an **automated Missed Call emai**l.
3. There does not need to be any further outreach by the coach.

**Coach responsibility**: Call at the scheduled appointment time, clearly state the deadlines and offer a next step for the client if a call is missed.

**Client responsibility**: Answer the phone and complete the coaching session as scheduled. If the session does not happen as scheduled, it is up to the client to set up another session and to do so within the contract’s specific deadlines.