Attachment 003 – Whole Health Application Backlog
August 10, 2018

1.1.1 MOBILE APP FUNCTIONALITY

The mobile app shall proactively engage the user through the following major steps and elements of the Whole Health journey:

1. Welcome, onboarding and overview of Whole Health.
2. 'Personal Health Inventory Light' to provide an initial baseline of information at onset for introduction of the user and their interest in Whole Health.
3. Whole Health Partner locating services to identify available resources within a defined area.
    a. This database is currently under development and will be maintained by VA.
4. Optional levels and approaches for participation by the user including:
    a. All-in approach facilitating user participation in Taking Charge of My Life and Health options for orientation, establishment and launch into the Whole Health journey.
    b. Slow-go/Ad hoc approach enabling the user to complete a self-guided journey with on-line resources. The mobile app shall be designed to facilitate the user's movement through the Whole Health journey.
5. User deep dive into "Circle of Health" with text and video based introduction of each of the domains as described here: https://www.va.gov/PATIENTCENTEREDCARE/resources/components-of-proactive-health.asp

    a. Videos (produced by VHA) shall facilitate the exploration of what the specific domain means to them.
    b. Experiences: The user shall be able to view and have a light experience of the resources that are available to them to support them in each specific domain.
    c. Identification and highlight of the user's selection of domains that are priority for them based upon the results of their Personal Health Inventory for continuous reference.
    d. User documentation of their baseline status (using questions defined by OPCC&CT) for each domain area.
6. User begins development of a PHP.
    a. The foundation of the PHP shall be auto-populated with information (responses) provided throughout the branching activities and may include the following key information elements:
        i. Establishing Specific, Measurable, Action Oriented, Realistic, Time Bound (SMART) goals for each selected domain area with prompts for how to define the goals, suggested wording and frequency.
        ii. Document user defined action steps for each goal in each selected domain area.
        iii. Set user identified milestones on a timeline to complete the action steps.
    b. Identify suggested support needed from their care team or other support people.
7. Selection of supporting resources.

       a. User shall have the ability to access a library of resources available to support goal achievement through the OPCC&CT internet.

       b. Ability to view available videos and other materials describing each pathway prior to choosing the programs or interventions.

8. User-facing Progress Report with capability for:

       a. Quarterly status check-in with auto-reminders.

       b. Comparison of quarterly status to baseline to reflect progress.

       c. Auto-generated recommendations based on completion of actions and progress results documented.

       d. Ability for the users to print out progress to share with care team (providers, Whole Health Partner, etc.) to view progress.

9. Ability for the user to update the Personal Health Inventory, PHP and SMART goals and actions at least annually with ongoing access to resources to support goals and actions taken.

10. Incorporate Application Performance Management tracking capability to track two sets of performance metrics: those that have to do with the performance the user experiences such as average load times, and those that measure computational resources that the app uses for the load.

1.1.2   WHOLE HEALTH MOBILE APP COMPONENTS AND CAPABILITIES

Welcome and Onboarding

1. The app provides the capability for the user to download the app, create a profile on the device and routinely access the app. Instructions for downloading and navigating the mobile app shall be included.

2. Upon download, a welcome and orientation pathway is triggered prompting the user to watch VA-produced welcome and orientation videos describing the Whole Health System, what he/she can expect from participation in the program and how to navigate the app. The pathway shall be able to enable:

       a. Standard videos to be played in sequence.

       b. The ability for the user to choose to watch later.

Help and User Support

1. The app shall provide a set of user support materials. These shall be to guide the user through the software, explain terminology used, provider samples and responses to common questions and basic commands ask new questions/ report issues and provide a mechanism for providing feedback on the user experience.

       a. User Guide

       b. Glossary

       c. Common Questions and answers section

       d. Issue Reporting Capability

       e. Feedback

User Whole Health Profile

1. The Whole Health app shall include a comprehensive user profile to include a results dashboard for viewing/printing. At a minimum, the user profile shall include or contain

the following information in summary form:
    a. The user's Personal Health Inventory results.
    b. The user's Mission Aspiration and Purpose (MAP).
    c. Circle of Health domain area(s) selected by the user.
    d. Baseline report reflecting the user's view of how they are doing in each domain area.
    e. SMART goals and action steps established by the user for each of the Circle of Health focus areas they have chosen.
    f. The user's portion of the PHP.
    g. The ability for the user to reassess each of the above on a periodic basis and modify as needed.
    h. The user's progress reports reflecting user self-evaluation on goal achievement and a trend analysis showing changes in status within each of the Circle of Health focus areas selected.
    i. The user shall have access to the user's Whole Health Profile (with appropriate interfaces in place) that allows viewing of results and user progress.
    j. The information from the user as defined above shall be provided in summary fashion for ease of access and use in the form of dashboards to be designed in conjunction with OPCC&CT. The dashboards are to be accessible by the user.

Building of a Personal Health Inventory

1. The Whole Health app provides the capability to complete a short or light version of a Personal Health Inventory or a full version of the Personal Health Inventory based upon user choice.
    a. In order to complete the Personal Health Inventory, the app shall have documentation capabilities enabling the user to complete and update the Personal Health Inventory as needed.
    b. The Personal Health Inventory function shall be configurable to allow for a shorter and longer version of the Personal Health Inventory to be chosen by the user.
    c. The app shall allow for use of a Likert scale response as well as open ended text.
    d. The app shall include smart survey technology meaning that subsequent questions can be adapted based upon how the user responds to a previous question.
        i. The app shall be able to support the branching capability so that subsequent adapted questions are based on appropriate interpretation of the user's response to a previous question.
    e. The responses to the questions along with any open-ended comments or free text shall post to a summary of findings and results and present an overall Personal Health Inventory profile for the user that can be stored locally, printed and shared.

Selection Domains from the Circle of Health

1. A core component of the Whole Health journey includes the selection of domains of health from the Circle of Health that most closely align with findings and results from the user's Personal Health Inventory. The selection of domains shall influence the personalized health plan ultimately developed by the user. With that as a basis, this

functionality within the app shall do the following:

    a. Graphically display the 'Circle of Health' model with descriptions/definitions associated with each domain – either text based or video.

        i. The user must be offered the option to learn more about each of the domains they are interested in. In order to do that, the app shall provide ready access or host video content provided by VHA that would provide a testimonial and more information about the domains the user chooses to learn more about.

    b. The user must be able to access the summary results and findings from their completed Personal Health Inventory. Based upon those findings, the app shall provide recommendations of which domain areas from the Circle of Health best match or align with the user's Personal Health Inventory results.

    c. Using the same survey capability as defined above, the user must have the capability to select those areas of the Circle of Health that interest him/her the most and support his/her MAP.

    d. Once the user has selected domains they are interested in, he/she must be able to access a library of resources or experiences available to them through VHA and outside sources to support them in the specific domain. The library must be constructed to host a number of videos and text based descriptions of the domain related experiences that the user can choose from to view.

    e. The recorded baseline status shall be documented into the user's profile.

    f. Once the above is completed, the app shall be able to produce a graphical representation of which domain area(s) the user has selected within the Circle of Health.

Establishing SMART Goals

1. A core component of the Whole Health journey is the establishment of SMART goals by the user. Once the user has selected the Circle of Health domains they are interested in working on and those have been recorded in the user profile, the user shall be automatically guided to view a video provided by VHA on the domain. To do that, the app shall have the following capabilities:

    a. Populates a goal setting template with the domain(s) selected by the user.

    b. Offers examples of commonly set goals for the selected domain areas chosen by the user.

    c. Offers establishing SMART goals via free text or by establishment of a menu of goal-setting options.

        i. The format of the template shall follow the structure for SMART goals.

    d. Using the survey capability, the user shall be able to establish where they would like to be two to six months from now (they select timeframe) in each of the domain areas they have selected.

    e. The goal(s) selected and/or identified by the user, their baseline status and the targets or goals they have selected for themselves shall be documented in the goals section of the user profile.

2. Action Planning – the app shall be able to assist the user in establishing or defining SMART action steps they are committed to taking each week to reach their SMART goal(s) they have set for themselves for each of the Circle of Health domain areas. The

app shall synthesize the information provided by the user Personal Health Inventory results, Circle of Health domains selected, the SMART goal(s), action steps, challenges/barriers, contingency plans and support strategies). The app shall offer the following:

    a. The ability to enter free text action steps into an action plan template.

    b. Personalized recommended action steps within each domain area selected for the user to choose from as an alternate to the free text option.

    c. In addition to the goals selected or entered, the app shall offer the user the opportunity to set a target date or timeline for completion of both SMART goals and SMART action steps from a calendar option.

    d. The ability to enter where they need support from their Whole Health Partner and/or Patient Aligned Care Team (PACT) using free text capability.

    e. The resulting action plan shall be documented or represented in the user profile.

    f. The format of the PHP shall be structured as follows:

        i. Summary Results of Personal Health Inventory

        ii. Circle of Health domains selected with baseline and target status

        iii. Life goals established within each chosen domain area

        iv. Level of commitment to achieve the SMART goals set within each domain area

        v. Action Plan to include steps, timeline to achieve, support needed

Weekly Action Planning

1. The user shall be automatically prompted via preferred methods of notification encouraging them to establish SMART action steps for achievement within the SMART goal domain area(s) they have selected. To do that, the app shall include a section for Weekly Action Steps and Achievement and include the following capabilities:

    a. The user is able to access a library of resources available to them to support completion of action steps and goal attainment (e.g. Be Tobacco Free or Eat Wisely).

    b. Once the Circle of Health focus area is selected, the user can choose action steps for the week from a drop-down menu or by entering a free text action step. A prompt should be provided to indicate whether they want to continue with their current action steps or modify/change their action steps in any way. It shall also include a reminder of SMART criteria for establishing action steps.

2. Challenges or Barriers.

    a. The user is provided the opportunity to identify internal or external barriers, either anticipated or realized.

    b. In addition, the user shall be prompted to identify what they can do to overcome those challenges or barriers.

    c. The weekly goals template shall be made available and viewable in the user's profile.

Selection of Support Resources for Goal and Action Steps Achievement

1. VHA (directly through the OPCC&CT internet and/or through community resources) provides a host of resources to support the user in goal achievement. The app shall provide the user the following:

     a. A menu of resources available to them: what, when and where.
- i. The resources menu shall be constructed using a drop-down menu that enables the user to do the following:
    - a. Select focus area
        - i. Within focus area – drop down menu of resources available
            1. Short Experiences (10 minute) video guiding user through experience of various options (courses/programs/coaching)
            2. Ability to view resources/programs/interventions to help achieve plan
            3. Ability to access full programs online (VHA and external)
- b. A resulting schedule including a weekly planner reflecting the support resources they are interested in participating in.
- c. A survey (using a Likert scale) to measure the user's level of confidence in meeting the goal.

Development of a PHP
1. The core result of the Whole Health journey is the establishment of a PHP developed by the user (in conjunction with their Whole Health Partner and/or PACT) that outlines formation of the PHP and incorporates or utilizes the following capabilities:
    - a. The foundation of the PHP shall be auto-populated with the following key information elements:
        - i. User's name and contact information
        - ii. Their MAP (from the Personal Health Inventory)
        - iii. Self-assessments in the Circle of Health (from the Personal Health Inventory)
        - iv. The areas of focus selected by the user from the Circle of Health (graphic highlighting areas selected)
        - v. The user's recorded SMART goals and action steps for each of the focus areas they have selected
        - vi. Barriers and Contingency plans (both anticipated and realized)
        - vii. Support Strategies
        - viii. Progress assessments (ability to change weekly)
        - ix. Desired support from health providers/programs

Evolving Progress Report ("My Progress Report")
1. The app shall track user progress over time. The app shall offer the capability to both automatically record and allow custom data entry by the user. The Progress report shall offer the following capabilities:
    - a. The user must be able to record daily activities in a journal or log format related to each of their established goals. The format of the daily progress report shall include the following for each of the selected domain areas. The results of the daily check-in shall be viewable in summary form by the user. A suggested format or template is provided below.

       i.   Day of Week
     ii.   Goal (with the capacity to modify as needed)
    iii.   Action Taken
    iv.   Comments (How I felt, challenges, successes)

b. The user must also be auto-prompted to complete a quarterly check-in that provides the following capabilities:
       i.   Re-do of the Personal Health Inventory
     ii.   Goal achievement summary
    iii.   Gains vs. Baseline comparison and trend: the user shall be prompted to complete an evaluation (using the smart survey capability) of their status in each of their selected domain areas comparing that result to the baseline and previous quarter status results in order to show trend against target over time.
    iv.   The app shall generate suggestions or recommendations based on the results of the progress report on what the user may do to further achieve their goals

c. The results of the quarterly check-in shall be documented, viewable and editable within the user profile.

1.1.3   MOBILE APP TECHNICAL REQUIREMENTS

All of the requirements shall be elaborated on during the development process. The Contractor shall be responsible for developing the branching, gamification, and wireframes used to guide the development process. The Whole Health Application must meet the following requirements at a minimum to be considered technically acceptable:

1. Be compatible with iOS and Android devices and downloadable from the VA's App Store, Google Play Store or Apple App Store, respectively.
2. The Contractor shall not collect or store Veteran information on any servers.
3. The Contractor shall identify their hosting plan if it is outside the VA Mobile Framework Environment
4. Be able to interpret responses and respond appropriately to modify and adapt the Whole Health path based upon the individual user's response.
5. Utilize an automated workflow technology that is triggered by external data and/or user input and response to logically guide the user through various elements and components of the whole health solution.
6. Contain functionality to show user tasks they've completed and remaining unfinished tasks such as gamification.
7. Be able to filter local listings of providers on defined listings to identify available resources.
8. Offer smart branching capabilities based on user's response.
9. Contain branching technology with scoring and documentation capabilities for various applications.
    a. Developed using VA patient generated database available with FHIR API's.
10. Include interactive data triggered workflows or pathways to enable a dynamic PHP with automated assessments and feedback based on actions taken. This includes:
    a. Data triggered pathways or workflow technology combined with the capability to facilitate the user's journey through the Whole Health process.

b. The workflow technology shall be capable of logically guiding the user through the Whole Health process offering a queue and return prompt/messaging when the user is ready to engage.

c. The capability to provide auto-generated recommendations and guidance based upon the user's completion of interventions, response to prescriptions, completion of goals and data input comprising the Progress Report.

d. These workflows or pathways shall be customizable and capable of alerting users based on multiple triggers.

e. Based on user's interaction/responses to workflow alerts, the workflow technology shall be able to follow up with various and multiple automated actions customized to the workflow.

11. Include a schedule or calendar for use by the user with the ability to auto-populate events that are scheduled through the app by the user.

12. Be able to host a variety of video for education, orientation, information and guidance for the user with the ability to easily upload and manage additions to content as well as updates to content already hosted within the app.

13. Provide a dynamic, adaptive solution for users participating on a Whole Health journey. This functionality with the data triggered pathways or workflows will allow for changes in direction based upon user input regarding their needs, preferences and progress.

14. Enable the user to maintain a journal and have the ability to record or log questions for their care team.

15. Allow the user to research and find contact information for local Whole Health Partner, affiliated with their local facilities. The app shall include the ability for the user to view profiles of Whole Health Partners, choose selection criteria from a defined list, and then save the selected information for the user to reference.

16. Have the ability to set notifications, alerts and reminders for the following:
    a. Interventions and events scheduled (classes, workshops, seminars).
    b. Routinely record and track progress checks on his/her achievement against his/her PHP and goals.
    c. Any recommended interventions, resources, videos identified by the system as appropriate based on user provided responses.

17. Include gamification that will encourage user's participation in the app. The Contractor shall make recommendations for the best way to this gamification based on its experience and capabilities to provide an innovative approach.

1.1.4 ADDITIONAL FUNCTIONALITY

1. Ability to integrate with myHealtheVet.
    a. Users must be able to register and log into the myHealtheVet Patient Portal providing a single point of access for the Whole Health solution.
2. Ability to communicate with the user assigned care providers and coaches.
3. Ability to integrate with/document into CPRS (Personal Health Inventory data, PHP), along with integration into myHealtheVet – it is anticipated that the results of the Personal Health Inventory, and the user's progress report will be documented into VistA/CPRS.
4. An important element or feature of the Whole Health app will be a comprehensive user

profile that can be integrated with VistA/CPRS and accessible by both the user and their care team (Whole Health Partner and PACT).

    a. The user's Whole Health Profile should contain the following:

        i. Summary information from the user's Personal Health Inventory and PHP as well as a dashboard displaying ongoing progress and with the ability to input recommendations, comments, and prescribed interventions.

5. The user must have the ability to access the following information through the app:

    a. Educational material received while at a clinic or in a hospital.

    b. List of active medications.

    c. Access to care plans/discharge instructions.