**How To Do HOPE: ENROLLING Patients and TRACKING Data**

All of the forms and tools you will need are on the HOPE website under the [Project Details tab.](https://medschool.cuanschutz.edu/helping-our-patients-engage-in-weight-management/project-details/data-collection-management) The documents can be found in the sub-sections for HOPE Project Resources and HOPE Project Curriculum and Project Tools. Titles are shown here in purple so you can find the corresponding documents, most of which will immediately download to your computer.

1. **Offer HOPE to your eligible patients and complete the** [**HOPE Patient Enrollment DATA Sheet**](https://medschool.cuanschutz.edu/docs/hopehelpingourpatientsengageinweightmanagementlibraries/training/hope-patient-enrollment-data-sheet-final.xlsx?sfvrsn=f6fa1bbb_0)**.** Create a patient ID and enter the patient’s data, yes/no/considering, etc. in this Excel spreadsheet as you offer and enroll patients. This master Excel spreadsheet you will need to keep on hand throughout the study and it will grow month by month.

As a reminder, your patients are agreeing to a clinical care intervention with your practice, but there is no specific enrollment process other than agreeing with **you** to participate for the patients in HOPE (No forms or releases for patients to complete for **us**.) Thank you for also tracking data about patients who decline and/or are considering participation.

1. For those patients enrolling in HOPE, please **track what was completed at each visit.** This will either be done in the [**HOPE Group Patient Visits and Intervention Delivery DATA Sheet**](https://medschool.cuanschutz.edu/docs/hopehelpingourpatientsengageinweightmanagementlibraries/training/hope-group-patient-visits-and-intervention-delivery-data-sheet-final.xlsx?sfvrsn=4cfa1bbb_0) or[**HOPE Individual Patient Visits and Intervention Delivery DATA Sheet**](https://medschool.cuanschutz.edu/docs/hopehelpingourpatientsengageinweightmanagementlibraries/training/hope-individual-patient-visits-and-intervention-delivery-data-sheet-final.xlsx?sfvrsn=5dfa1bbb_0)**.** In order for you to keep Patient A data attached to Patient A throughout the study, you will use ***the same Patient ID from the Enrollment DATA Sheet as on the relevant Delivery DATA Sheet*.** ONLY YOUR practice will have the ability to connect patients and IDs so please be sure to keep master copies of these spreadsheets in at least one separate location with backup. We will need to be able to connect these data later when we do our medical record reviews (towards the end of the project). **Please be sure to keep your own tracking of which person is which Patient ID.**

There are two tabs so be sure to complete both tabs for each visit. Individual visits will be tracked for each patient at each visit. Group sessions will only gather data on the activities of the whole group (e.g., Were weights taken for everyone?) It will be your responsibility to create a system to keep track of group session attendance by your patients. The Delivery DATA Sheets for individual sessions are found under Data Collection.

Note for both the Enrollment and Delivery Sheets, we want you to add patient data over time and not remove any data (i.e. the data builds month to month). The file you will send will likely have more information each time you send it each month. This will make it easier for you to keep track of patients over time, including which have been enrolled, which sessions have already been completed, and what IDs have been assigned.

You will notice that the Delivery DATA Sheets ask you to track that activities took place, but not *what* the results/patient data is. Use **your own medical record to collect and store data on your patients**. We are asking you to track in the Delivery DATA Sheets IF something happened and in your medical record to record WHAT happened. For example, on these sheets enter IF you recorded a weight at a visit, and record the actual weight in your medical record for that patient.

1. Our suggested list of items to collect in the medical record at each visit is located in the [**General Medical Record Template for HOPE Sessions**](https://medschool.cuanschutz.edu/docs/hopehelpingourpatientsengageinweightmanagementlibraries/training/general-medical-record-template-for-hope-sessions.docx?sfvrsn=54a9f4bb_0). The medical record template is intended to be a guide you can use to build templates in your own EMR or create smart or dot phrases, depending on which EMR you use.
2. One tool you may not already be using in caring for your patients is the

[**Quality of Life Questionnaire**](https://medschool.cuanschutz.edu/docs/hopehelpingourpatientsengageinweightmanagementlibraries/training/quality-of-life-questionnaire.docx?sfvrsn=16a9f4bb_0)**,** a list of 5 questions, which is important for you to have patients complete at enrollment, 6 months, and one year. Please create a reminder flag in your medical records system.

The first page is instructions and the list of questions, in case you would like to ask these verbally. The second page can be adapted and/or printed if you want to give it to patients using paper (or some other format).

Please record these patient responses ***in your medical records****.* You may create a template in your medical record, copy and paste the questions and answers into the EMR, or upload/scan in the paper results. You can also keep the paper surveys. If you need assistance in collecting and storing this data, please talk with your practice facilitator about how best to record this information. We can create another Excel document for you if this would be helpful.

1. Uploading DATA to the HOPE Study Team. At the end of each month, you will *make an electronic copy* of the [**HOPE Patient Enrollment DATA Sheet**](https://medschool.cuanschutz.edu/docs/hopehelpingourpatientsengageinweightmanagementlibraries/training/hope-patient-enrollment-data-sheet-final.xlsx?sfvrsn=f6fa1bbb_0) and, as relevant to your interventions, the [**HOPE Group Patient Visits and Intervention Delivery DATA Sheet**](https://medschool.cuanschutz.edu/docs/hopehelpingourpatientsengageinweightmanagementlibraries/training/hope-group-patient-visits-and-intervention-delivery-data-sheet-final.xlsx?sfvrsn=4cfa1bbb_0) and/or [**HOPE Individual Patient Visits and Intervention Delivery DATA Sheet**](https://medschool.cuanschutz.edu/docs/hopehelpingourpatientsengageinweightmanagementlibraries/training/hope-individual-patient-visits-and-intervention-delivery-data-sheet-final.xlsx?sfvrsn=5dfa1bbb_0)**,** *remove the columns with patient names,* create a new file, and upload a copy of the de-identified patient information to us. To upload the documents, follow the steps in the **HOPE Monthly DATA Submission Instructions.**

Patient-specific data on attendance, weights, surveys, etc. will be gathered at the end of the study from your medical records.

If you have any questions, please don’t hesitate to contact your practice facilitator.