

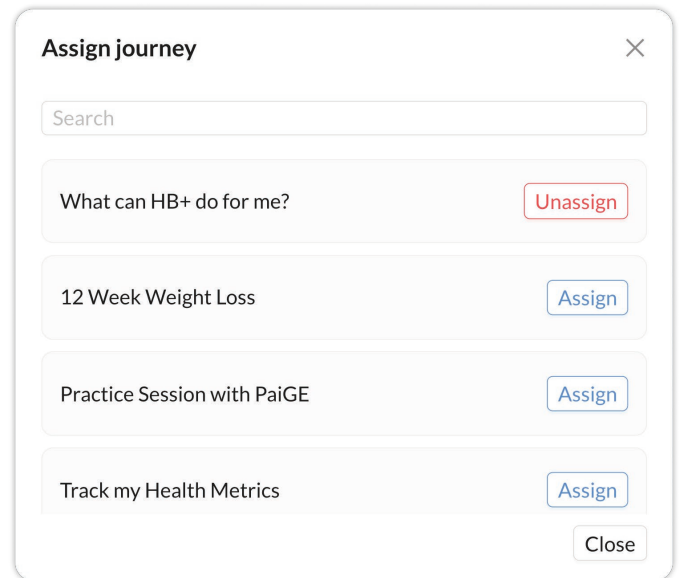
How to Assign a Patient Journey in the Clinician Portal

QUICK REFERENCE • PATIENT PROFILE > JOURNEYS

Journeys are HB+'s guided care programs – a sequence of steps your patient works through in the HB+ mobile app. The journeys available to you are set up for your practice by HB+; from the Clinician Portal you assign them to patients, follow their progress, and unassign them when they are no longer needed. Providers can now assign Journeys directly, the same way Coaches and Admins always have. There is no new setting to switch on.

Assign a Journey to a Patient

1. **Open the patient profile** from the Patient List.
2. **Go to the Journeys tab.** Any programs already assigned appear under Assigned journeys.
3. **Click "Assign."** The Assign journey window opens, listing every journey available to your practice.
4. **Search or scroll.** Type in the search field to narrow the list, or scroll to browse it.
5. **Click "Assign" next to the journey you want.** A patient can carry more than one – assign as many as you need before closing.
6. **Click Close.** The journey now appears in the patient's Assigned journeys list and becomes available in their mobile app.



Track Progress

Each assigned journey appears as a card on the Journeys tab, showing the journey name, assignment date, time in progress, and steps completed out of the total. A progress bar makes it easy to see how far the patient has come, so you can check their progress without having to ask.

Remove a Journey

If a journey was assigned in error or is no longer relevant, unassign it from the patient's Journeys tab. Progress is tied to the assignment, so re-assigning the same journey later starts the patient over.

Good to know

- Your journey list is set at the practice level. If a journey you expect is missing from the Assign journey window, it has not been made available to your organization yet. Reach out to HB+ and we can assist.
- Search in the Assign journey window is case-insensitive.
- A patient can be on several journeys at once. Assign them one at a time from the same window.
- Assignment is per patient. Assigning a journey to one patient does not affect anyone else on your panel.
- Labels and journeys are separate. A label is a tag you apply for your own filtering; a journey is a care program the patient actually works through.