



Chronic Disease Management Health Coach Certificate

Module 2

2021

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If you have any questions, please contact us here in HLLN at 416 736 2100 X22170 or hlln@yorku.ca. Thank you, Tania Xerri



Tania Xerri, Director, Health Leadership and Learning Network

A Leader in Health Continuing Professional Education

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TRACY MILNER

OT Reg. (Ont.), MCISc (OT), BA (HKin)

Tracy Milner, CEO of BrainFx and an occupational therapist by background, has led several multi-disciplinary teams focused on maximizing quality of life for people with brain disorders through neurorehabilitation over the past 16 years as part of both national and provincial health organizations. BrainFx was inspired by sheer clinical frustration. Over the course of her career, she has been a frequent presenter at many brain injury, mental health, and long-term care conferences in Canada and the United States. She has led several types of workshops related to the incorporation of technology into practice. She is a faculty member of the Health Coach Certificate at York University and developed a volunteer training course on maximizing quality of life for people with Early Dementia for the Alzheimer's Society of Ontario. Tracy Milner has served as a committee member with the Ontario Society of Occupational Therapists for >12 years and is currently a board member with the Ontario Rehab Alliance, which advocates for >120 rehabilitation companies.

Health Coaching

CHRONIC DISEASE MANAGEMENT
MODULE 2: ASSESSMENT (Ax)

Instructed by: Tracy Milner

1

Introductions

2

Instructed by:

Tracy Milner OT Reg.(Ont.)

- Assessing & Treating almost 20 years
- Case Management & Life Care Planning
- Leading multi-disciplinary teams >15 years
- Health provider advocacy through provincial associations
- Clinical interests & Research:
 - Cognitive & psychosocial interactions in health
 - Evaluating technology for use in practice
 - Maximizing function in early stage dementia
 - Early identification of cognitive dysfunction
 - Detecting milder cognitive dysfunction
- Co-Creator of:
 - Models of Neurofunction
 - Canadian Model of Cognitive Skills
 - Functional Framework of Health
 - BrainFx Assessments
 - Mynder: Homework App for Youth for CBT
 - Cognitive Behavioural Sensory Demands Analysis for work



3

Module Outline

DAY 1

1. Intros & Agenda
2. Foundations for Ax
3. Assessing the Whole Person
4. Framework for Health
5. Health Coaching Assessment Intro

(Self-Directed) Tonight:
Practice with your Persona – Health
Coaching Assessment Framework
Review Hannah Case Study

DAY 2

6. Health Coaching Assessment
 - a. Referral & History
 - b. Physical Health
 - c. Brain Health
 - d. Mental Health
 - e. Identifying Health Concerns
 - f. Assessment Plan
7. Health Coaching Plan
8. Application: Hannah Case Study:
 - a. Assessment
 - b. Plan

4

Foundations For Assessment

5

Developing your Persona

6

Your Persona

Take a few minutes and write down a persona of someone you might see as a health coach:

- Age, Gender, Culture
- Chronic Disease(s)
- Other co-morbidities
- Social, Living, Economic situation
- Work/ Leisure activities
- Why they are seeing you?

7

Introducing Your Persona

I'm your Health Coach.

You are your given persona.

Introduce yourself to me:

"Hi, my name is X. How are you?"

8



What Was Each Person's Diagnosis?



This is why we assess.

A strong assessment is a critical starting point.

Break-Out Rooms



TOTAL OF 10 MINUTES
(5 MIN EACH)



ASSESS EACH OTHER

11

What was that like?

What did you ask about?

How did it feel as the assessor?
As the client?

12

Assessment Benefits from a Structural Framework

We will learn about this today

13

What is Health Coaching? Why Health Coach?

14

Health Coaching

Applying your set of skills and competencies to support clients in leading healthier lives by promoting active lifestyles, improving diets, managing chronic health conditions, and reducing risky behaviours



To promote health



To reverse or minimize impairments



To improve or develop skills



To maximize function and minimize dysfunction

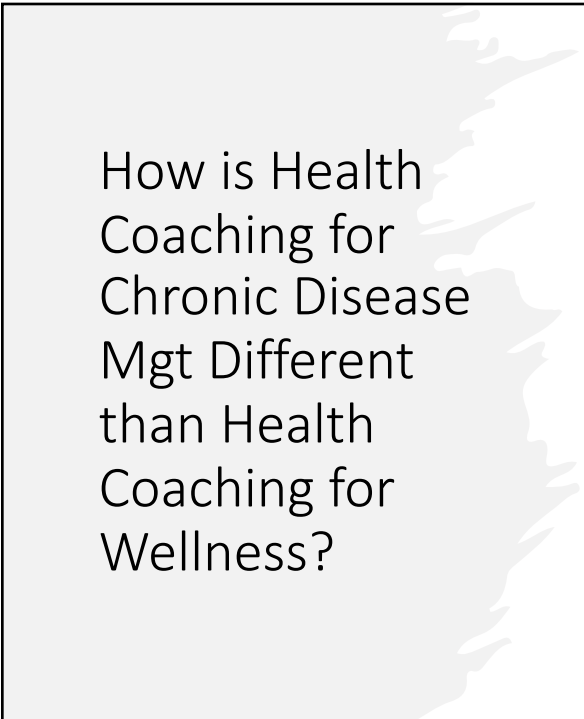
BrainFx

15



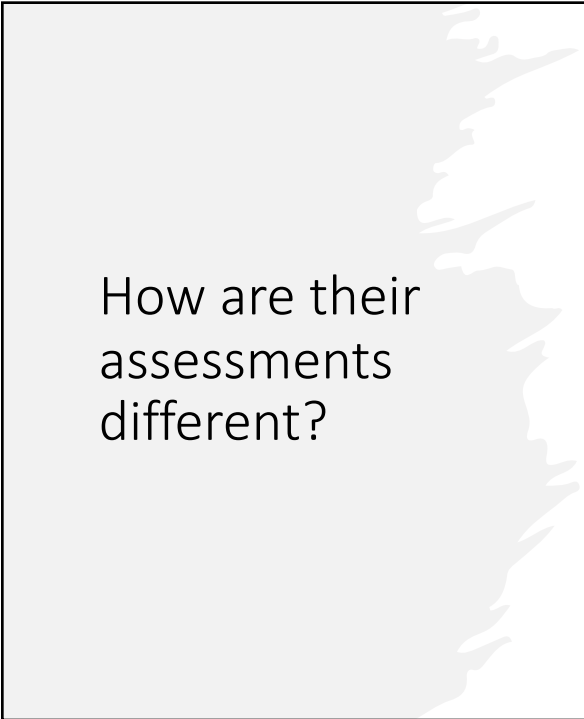
- Chronic Disease Mgt & Prevention including accessibility in community setting
- Population Health – understanding non-medical determinants of health
- Care of seniors including better care closer to home
- Better access and improved wait times including next day/after hours care
- Need for team healthcare approach
- Patient engagement
- Adoption of technology to improve care

16



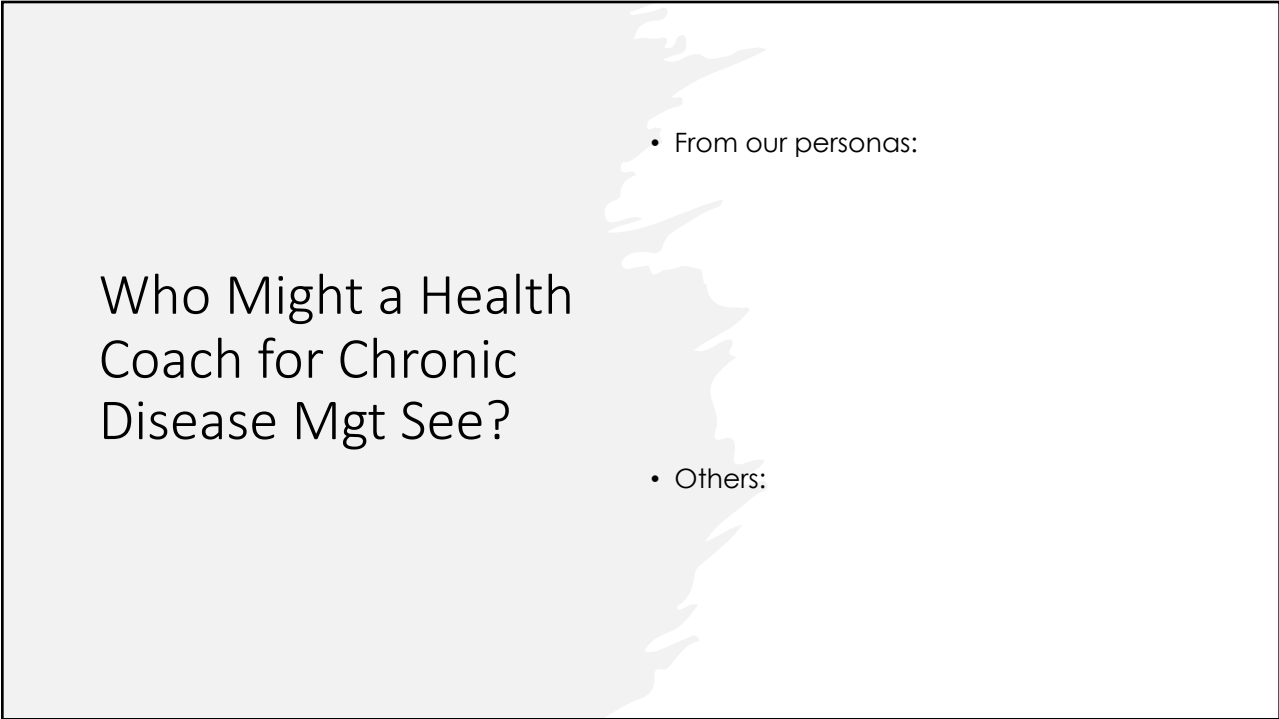
How is Health
Coaching for
Chronic Disease
Mgt Different
than Health
Coaching for
Wellness?

17



How are their
assessments
different?

18

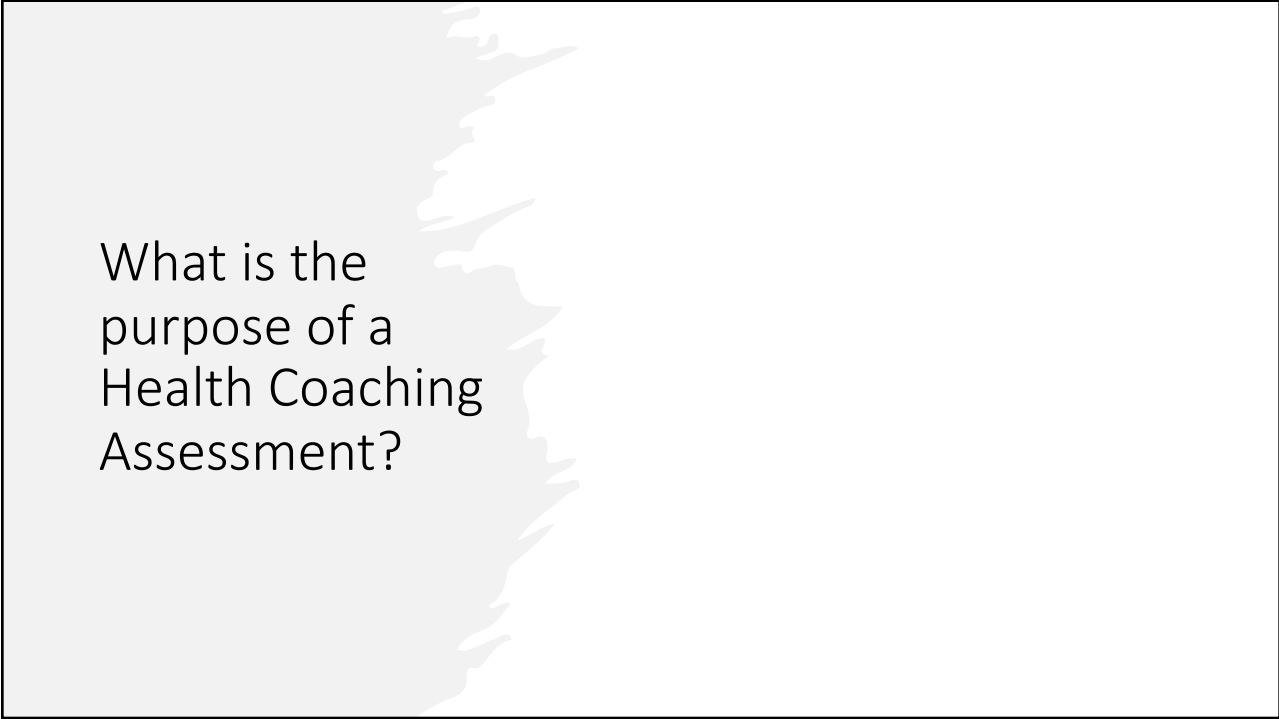


Who Might a Health Coach for Chronic Disease Mgt See?

- From our personas:

- Others:

19



What is the purpose of a Health Coaching Assessment?

20

Story about an Elephant & a Flea



A good assessment is your best opportunity to develop an effective treatment plan.

If you aren't asking the right questions. You can't prescribe the right treatment.

-me

Qualities of a:

Good Assessment

Bad Assessment

SMMART GOALS: For Developing Targeted Health Plans



S = Smart



M = Measurable



M = Meaningful



A = Achievable



R = Realistic



T = Time Based



23

Who do the Goals Belong To?

CLIENT (Client Centred)

What is going well for you?

What concerns do you have?

What are your goals?

How do you think I can help you achieve these goals?

CLIENT'S FAMILY (Family Centred)

What is going well for them?

What concerns do you have for them?

What are your goals?

How do you think I can help them achieve these goals?

CIRCLE OF CARE (Medical Centred)

What is going well for them?

What concerns do you have for them?

What are your goals?

How do you think I can help them achieve these goals?

HEALTH COACH (?)

What do I think is going well?

What concerns do I have for them?

What are my goals?

How do I think I can help them achieve everyone's goals?



24

Break-Out Rooms

Using Your Personas – Discuss the potential goals from the different perspectives

Why Consider
Augmenting
Assessment with
Technology?

- Time
- Information you can't gather traditionally
- Comparison data
- Quality of information
- Sensitivity, Reliability
- Predictive data

Critically Appraising Technology

What clinical utility will I derive from it?

How reliable is that information?

How valid is that information?


User friendly? Complex/ Simple

Intrusive- Non-intrusive / Passive-Active

How will my client receive it?

How can it help create a better treatment plan?

27



Important Considerations to the Health Coach in Assessment

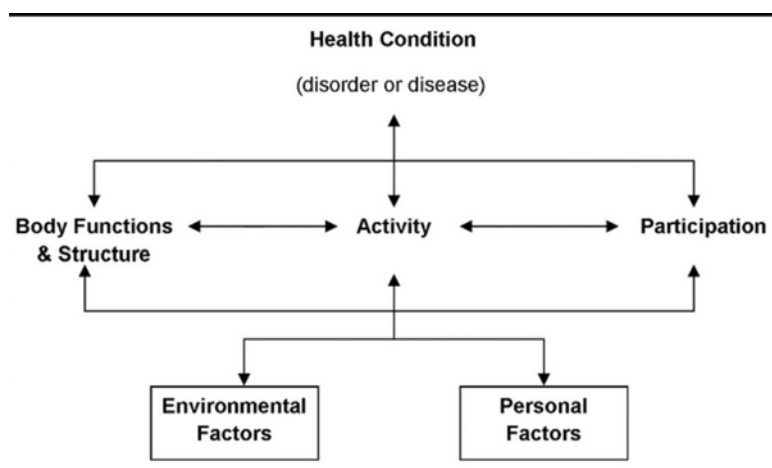
- Time available
- Time of day and how the person is feeling
- Quiet Room Bias
- Effect of assessor cuing
- Differences between subjective report and functional observation or performance
- Scope of Practice
- Regulatory requirements
- The danger of "silo vision"

28

Assessing the Whole Person

29

WHO ICF Model of Health



30

Framework for Health

(Milner & Condello, 2012)

PERSON:
Physical + Cognitive + Psychosocial

ENVIRONMENT or
CONTEXT

OCCUPATION or
DESIRED ACTIVITY/ TASK

Function
Health

31

Maximizing Quality of Life Model

PERSON:
Physical + Cognitive + Psychosocial

Function

ENVIRONMENT or
CONTEXT

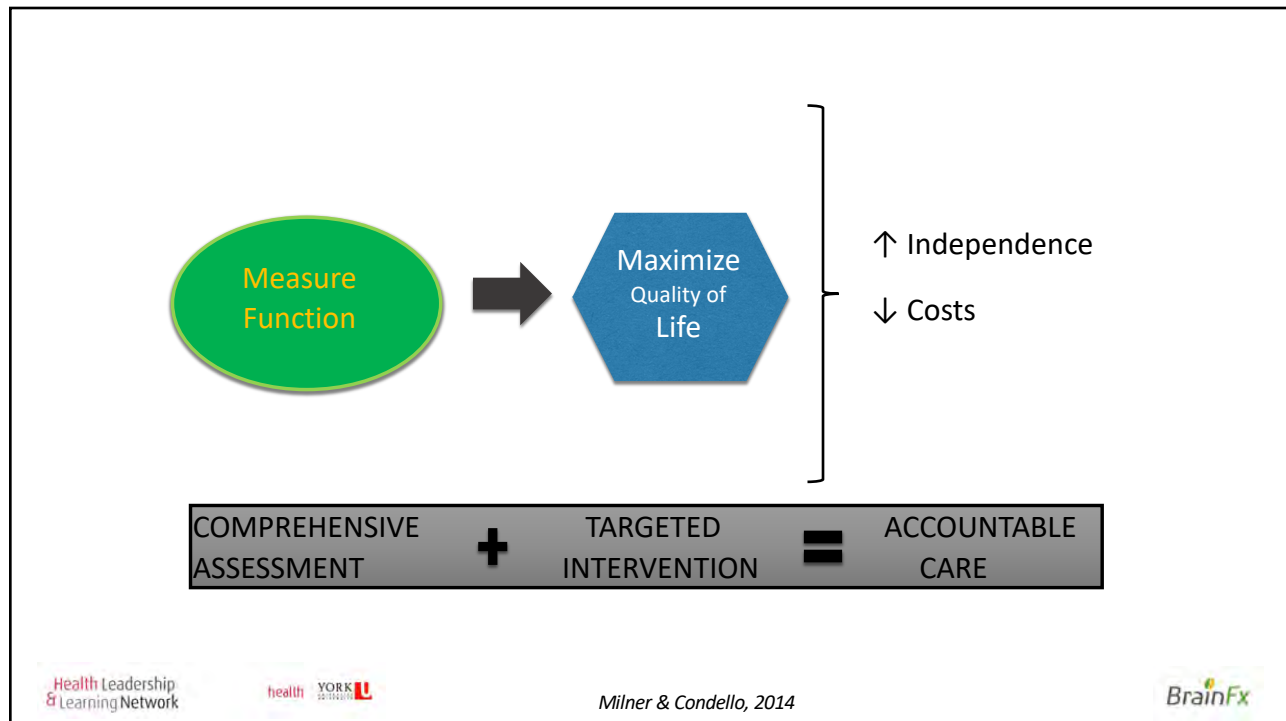
OCCUPATION or
DESIRED ACTIVITY/ TASK



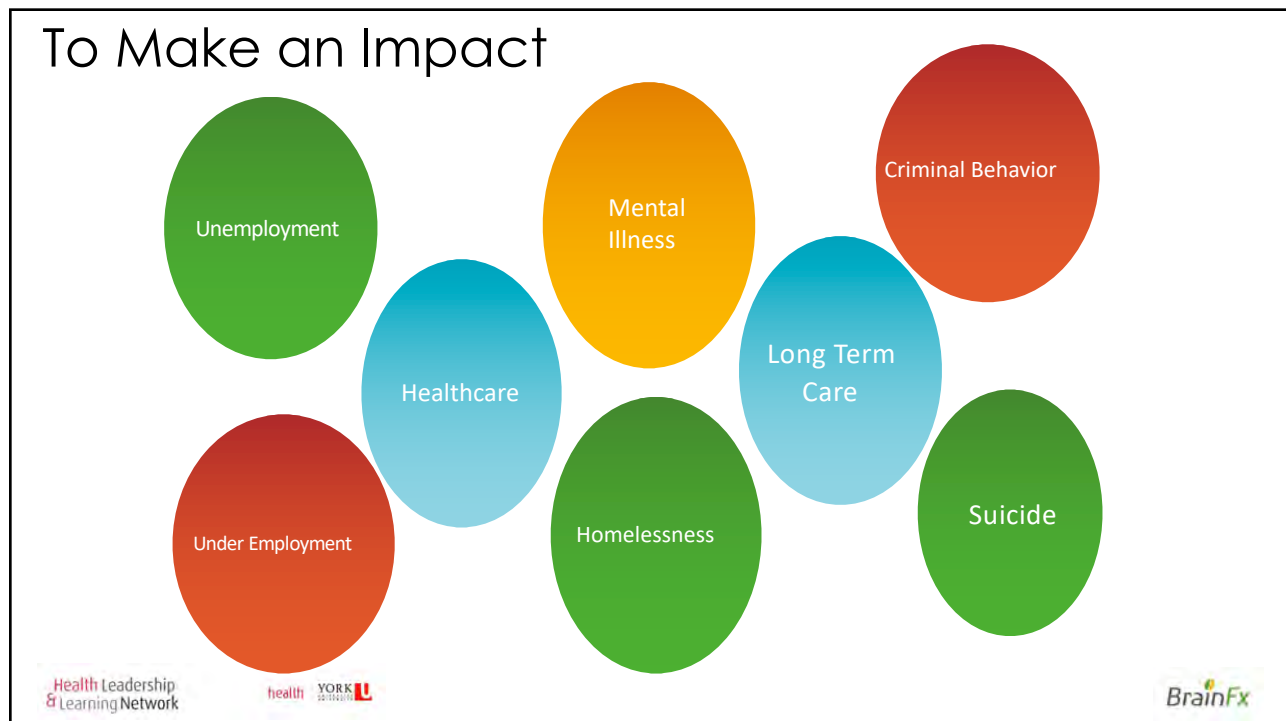
Maximize

↑ Quality
of Life

32



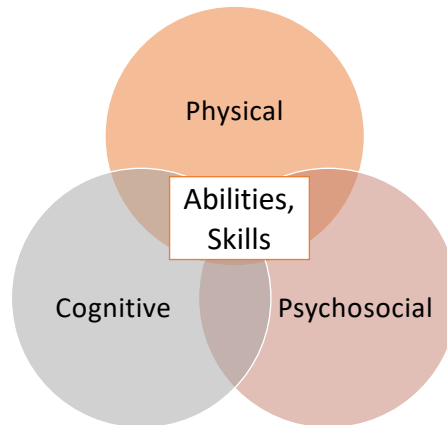
33



34

physical PLUS cognitive PLUS psychosocial

Why then
do we
measure in
silos?



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BrainFx

35

Self-Directed Learning Before Day 2

36

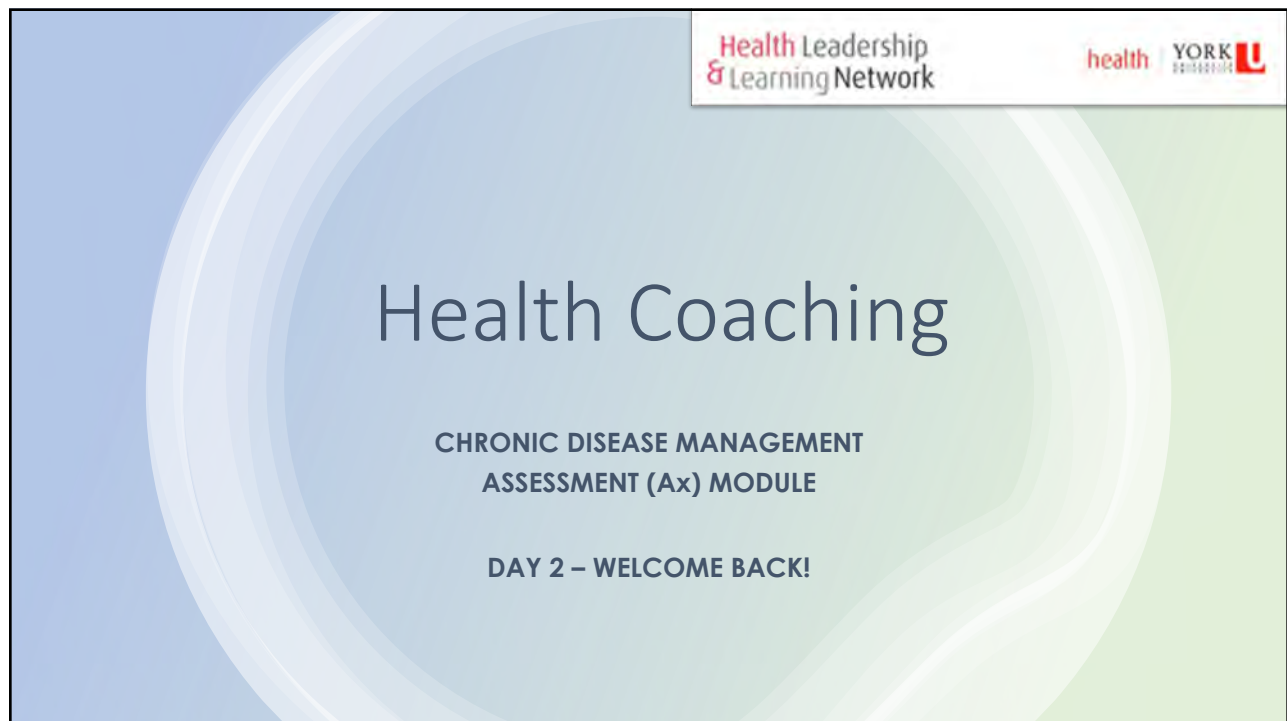
Your Assignment:

1. Review the Health Coaching Assessment Framework
2. Complete the Health Coach Assessment for your Persona

This is a first pass to assist with Day 2 Learning. We will be going over the assessment framework in detail and you will be able to update on your efforts as we cover each section.

3. Re-Familiarize yourself with the Hannah Case Study.

We will be applying the assessment module learning to it at the end of Day 2.



Your Assignment

You will be using the Health Plan Assessment that you completed for your persona throughout today's learning. Keep it open on your screen or beside you today.



39

Health Coaching Assessment

40


Reason for Referral & History

41

Reason for Referral

- What it says on your form
- What your client tells you

42



Medical History

- Diagnosis / Health Conditions
- Symptoms
- Medications/ Supplements/ Vitamins
- Surgeries
- Injuries
- Nutrition
- Sleep
- Alcohol, Drugs, Smoking

43



Social and Living Environment

- Living alone / with others?
- Family relationships
- Romantic relationships
- Social relationships
- Support system
- Living environment
- Lifestyle

44



Productive Activities

- School
- Work
- Volunteering
- Previous, Current, Future?

45



Caregiving, Household Responsibilities & Instrumental Activities

- Who do they need to take of (parenting, caregiver for parent)?
- What types of activities are part of their caregiving?
- Any special needs of the person(s) they care for?
- Which household responsibilities do they have? Which are important that they do?
- Which instrumental activities (groceries, finances, etc) are they responsible for? Which are important that they do?

46



Hobbies, Sport & Leisure

- History of activities
- Current activities
- Future activities

47



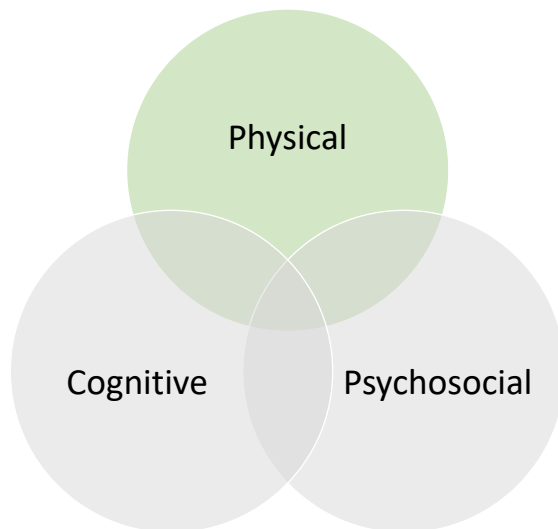
Other

- Assistive equipment or devices
- Mobility
- Legal circumstances
- Political circumstances
- Etc...

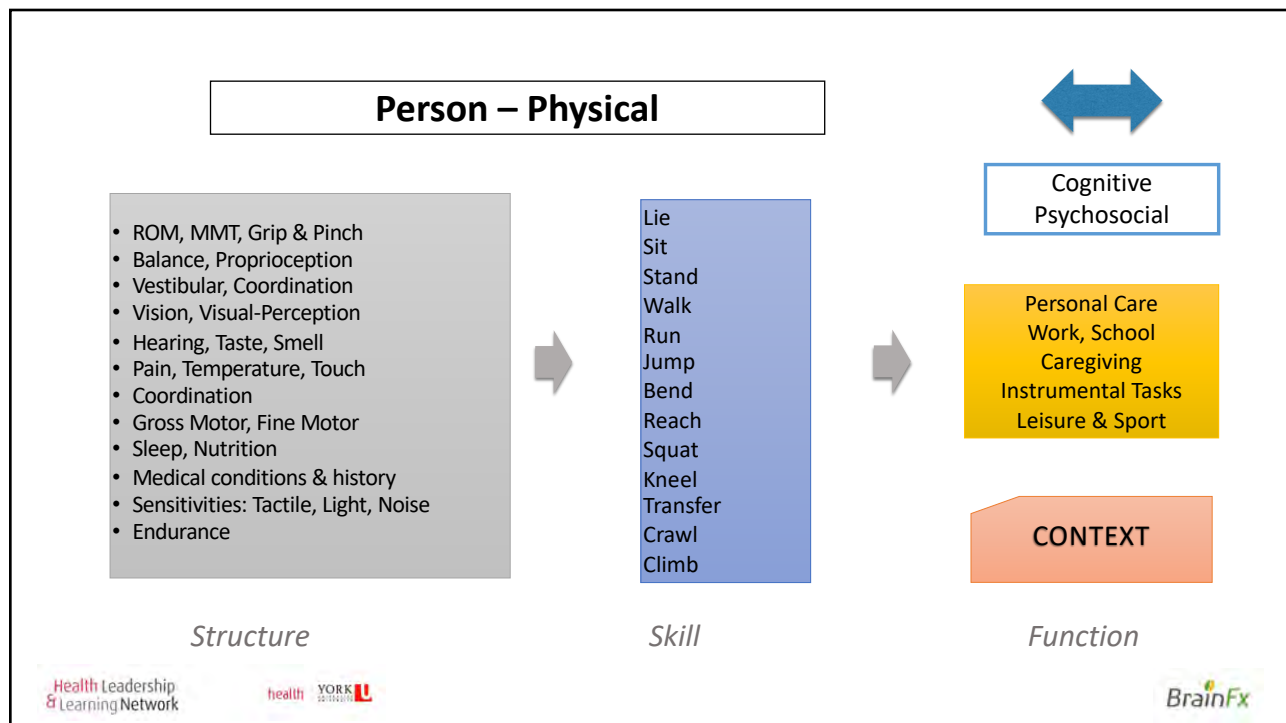
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Physical Health Considerations

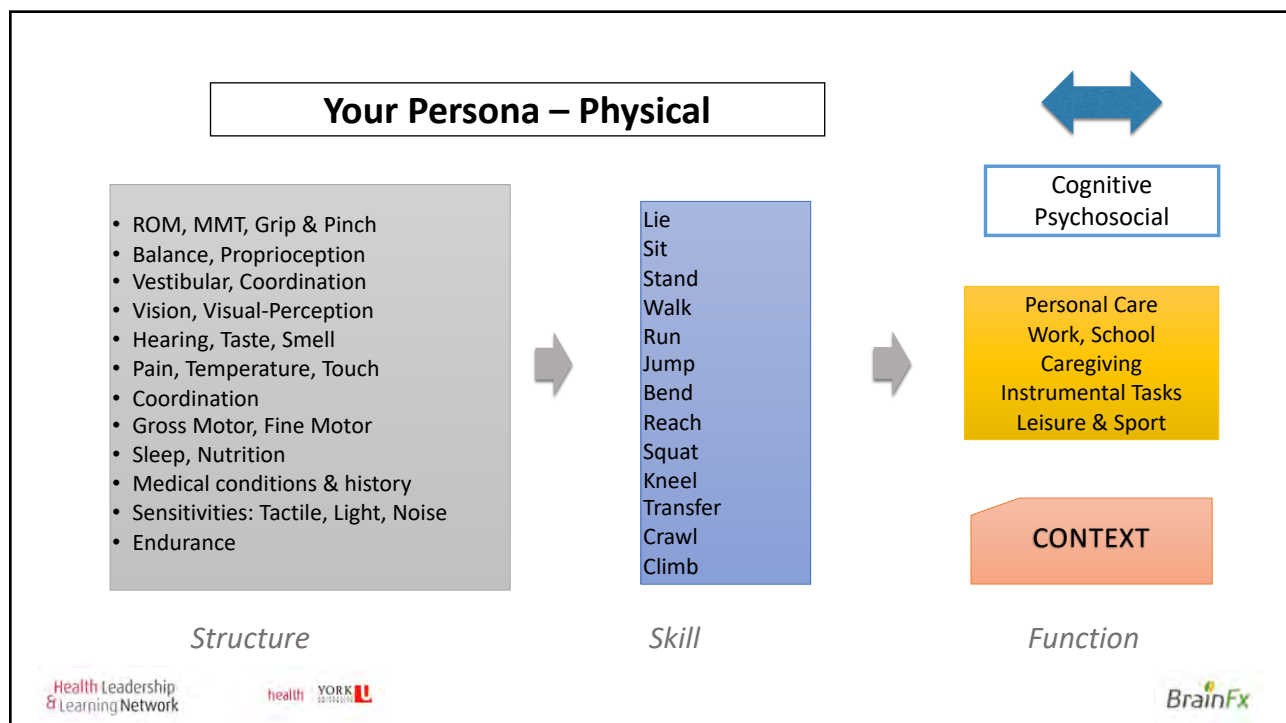
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50



51



52



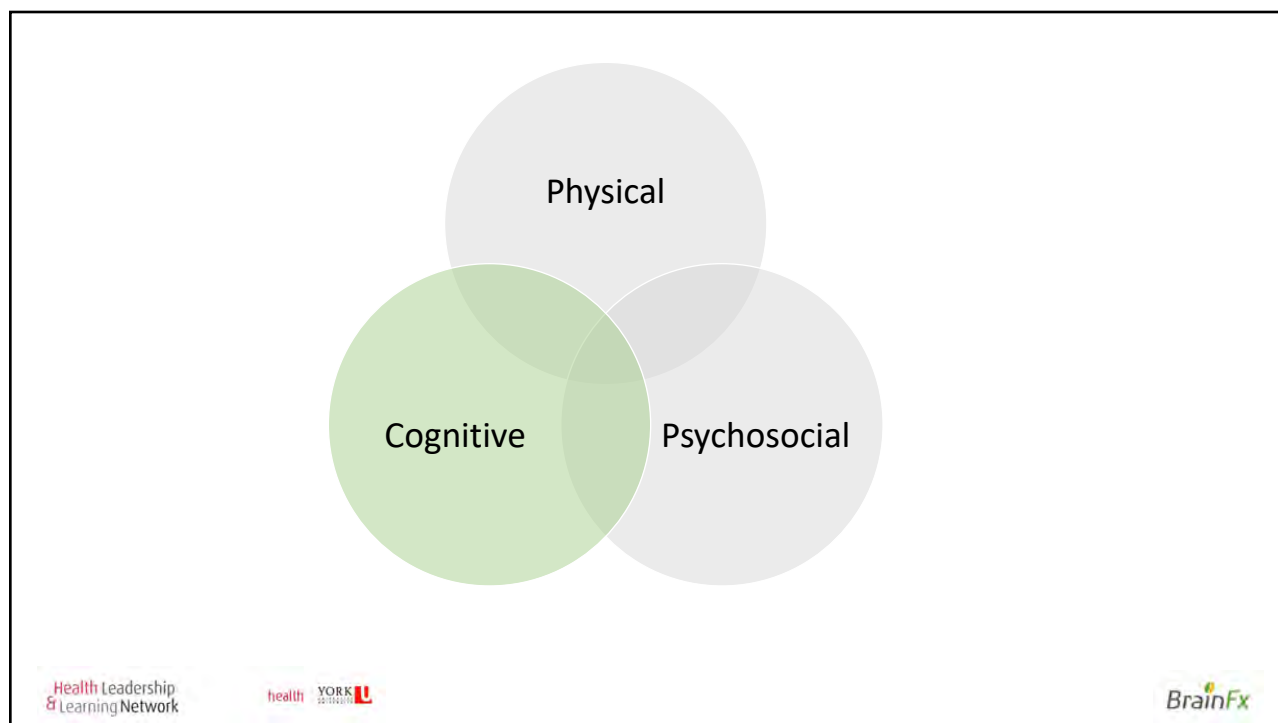
Update Part A for your Persona's Assessment

5 minutes

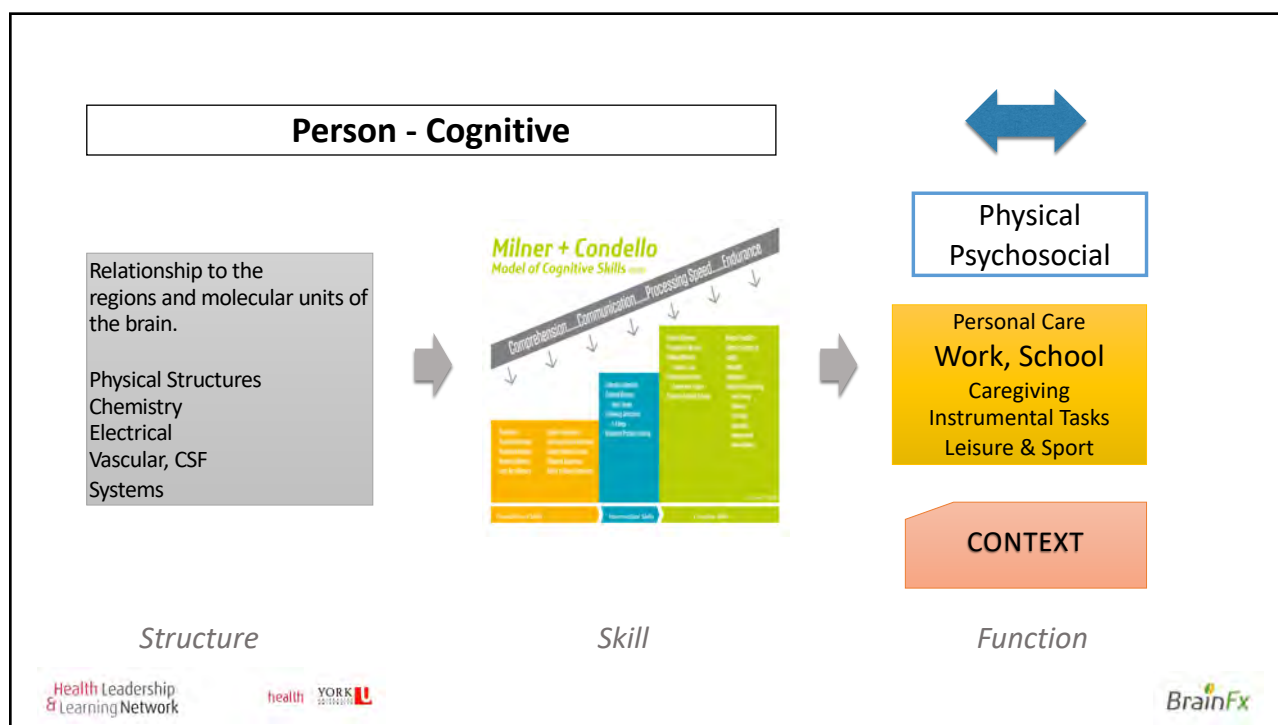
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Brain Health Considerations

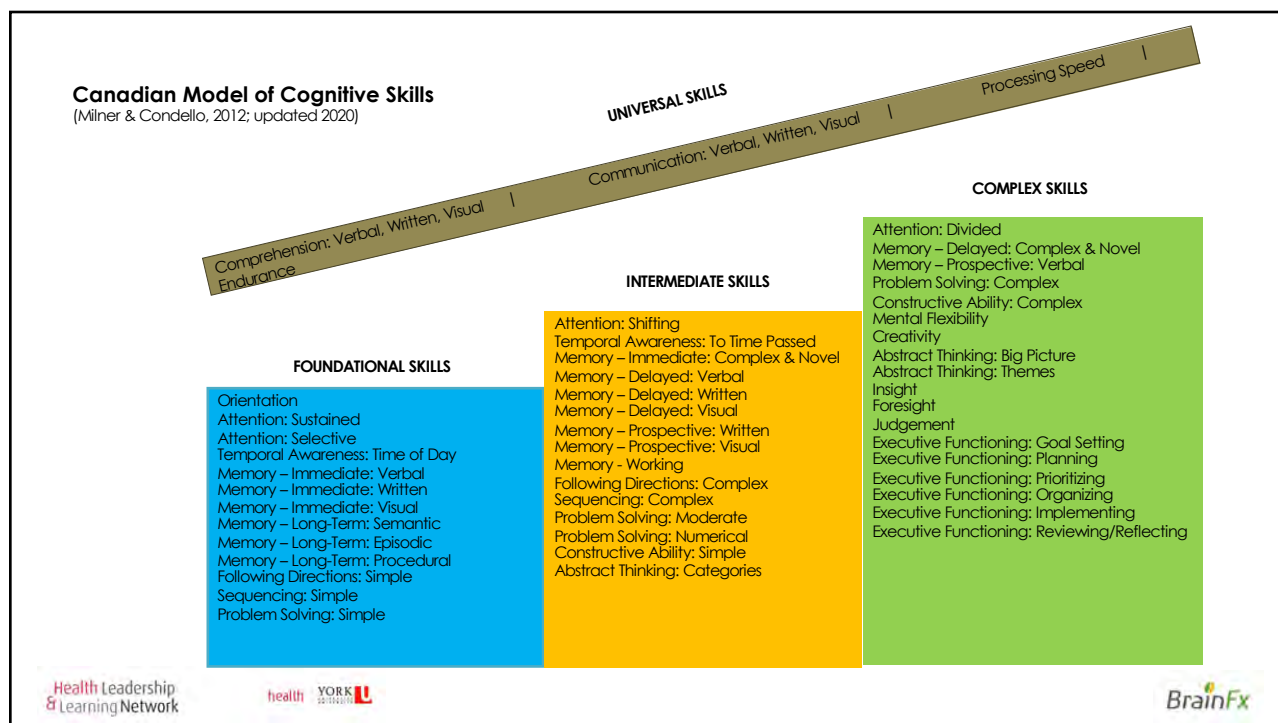
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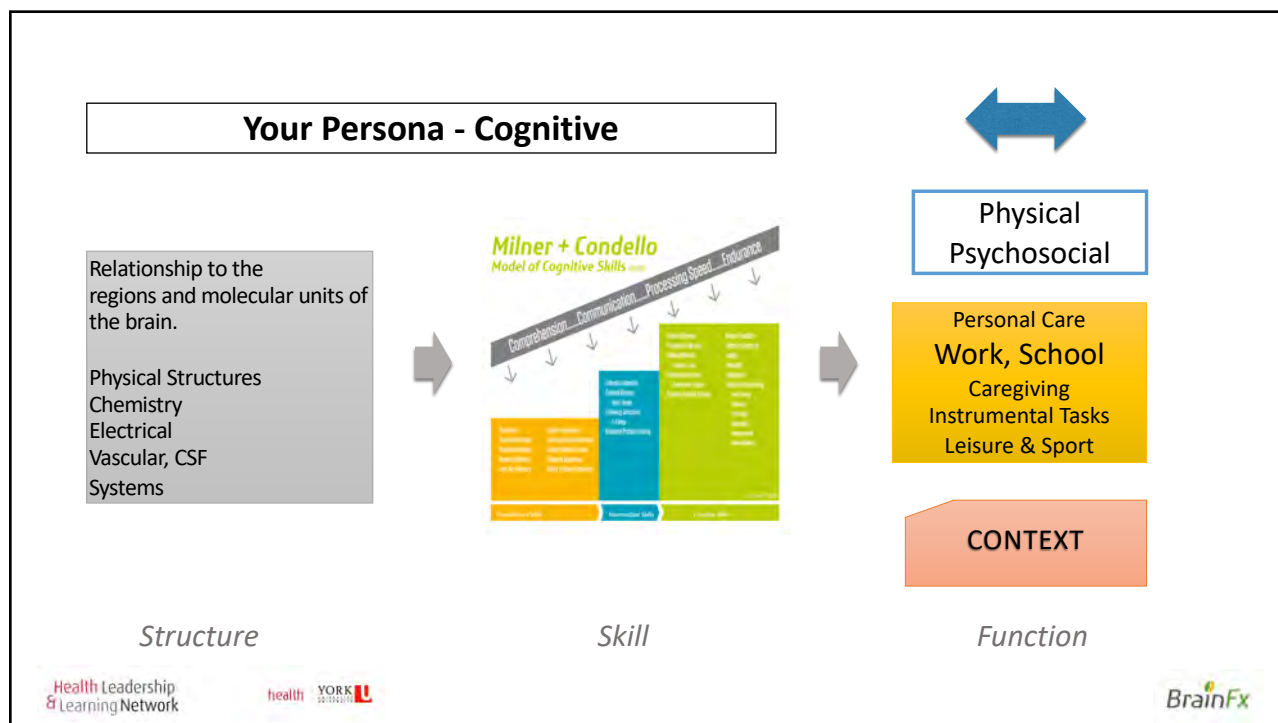
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56



57



58



Update Part B for your Persona's Assessment

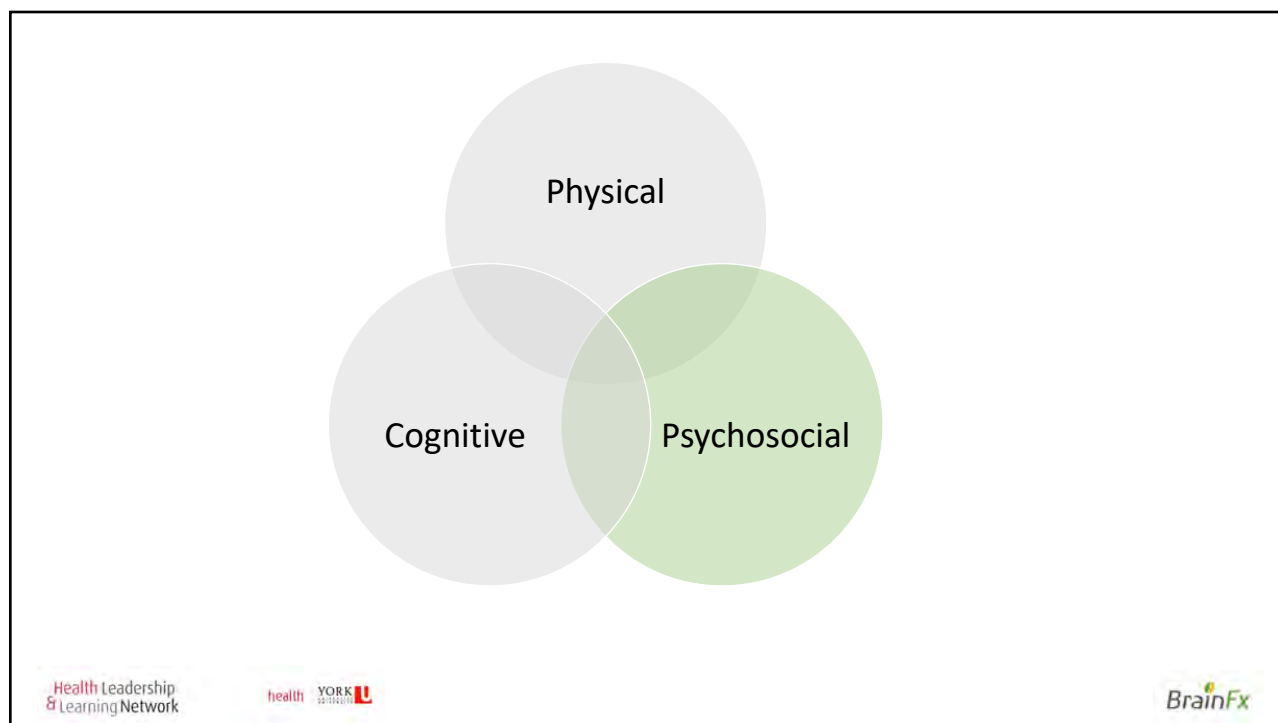
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BrainFx

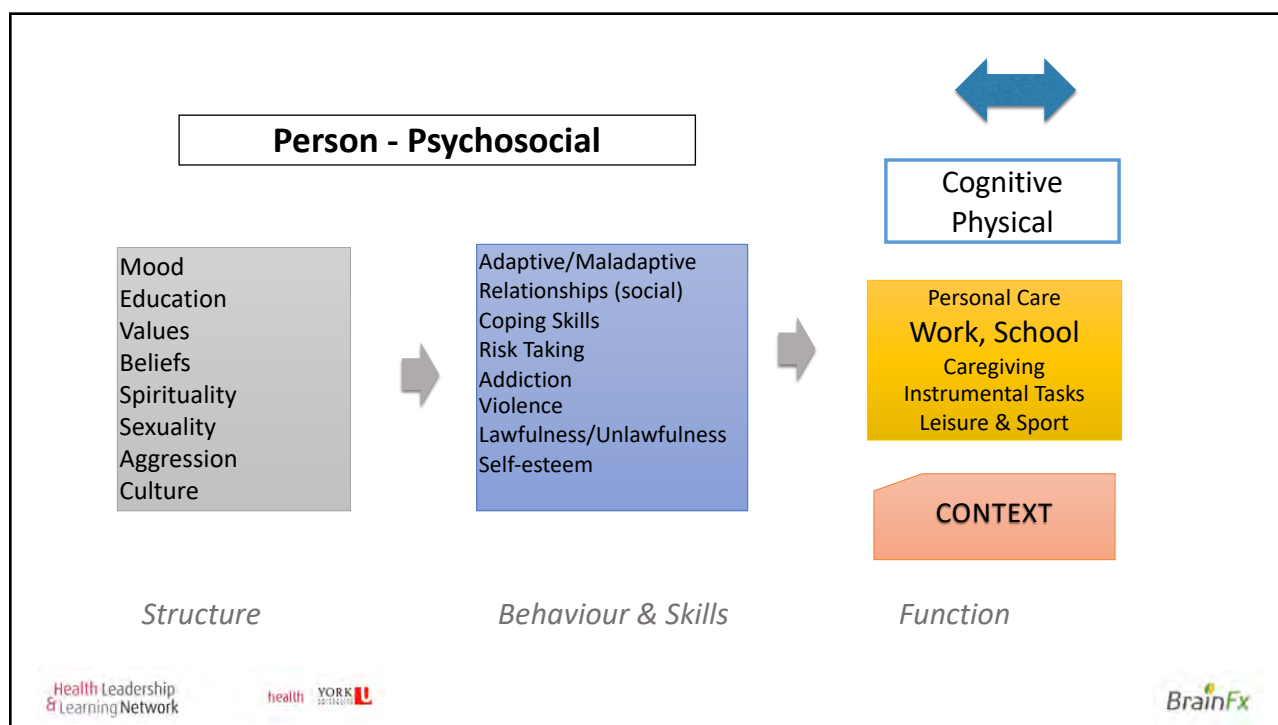
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Mental Health Considerations

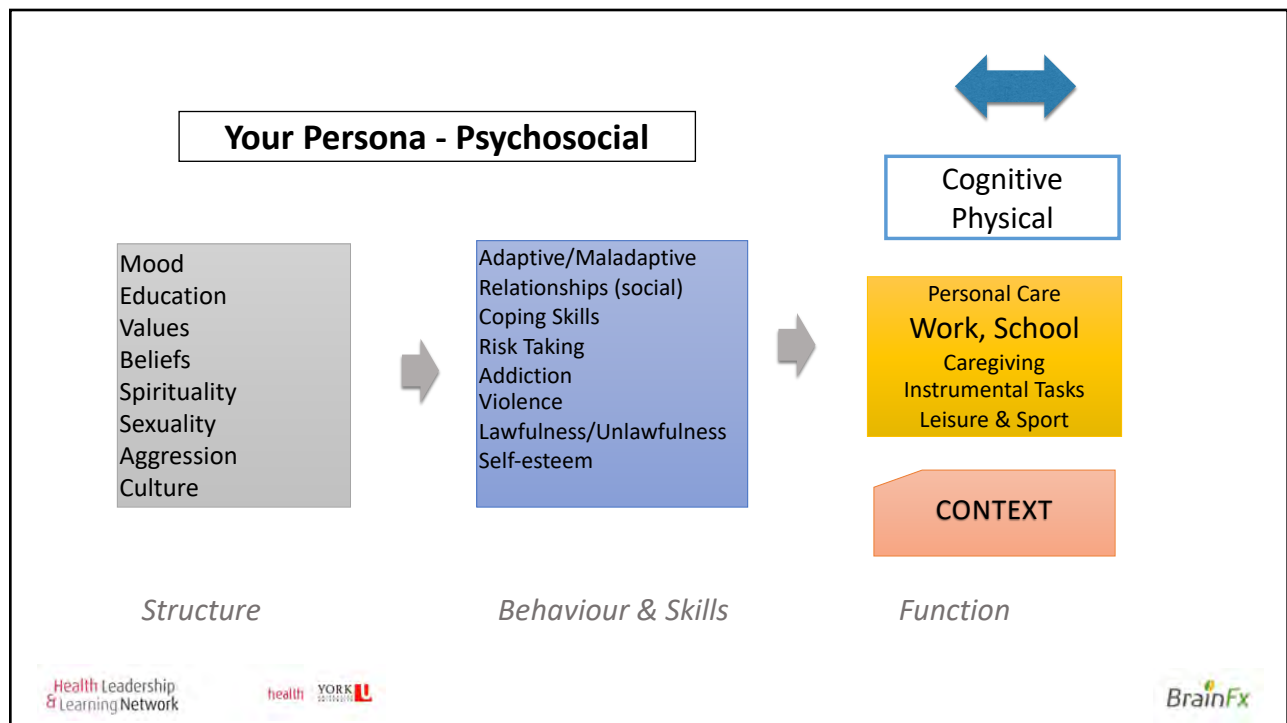
60



61



62



63

Update Part C for
your Persona's
Assessment

5 minutes

BrainFx

64

Identifying Health Concerns

65



Understanding Perspectives for Goal Setting

- Why is it useful to understand each of the perspectives?
- How can you use this information in goal setting?

66

Creating & Implementing the Assessment Plan

67

Assessments to
be completed by
the Health
Coach

- What will determine which assessments will be completed by the Health Coach?
- (add)

68



Tools & Technology for Physical Health

- Health stats
 - BP, heart rate, steps, activity tracking, glucose, POC blood tests and other tests
 - ROM with Kinect, nerve visualization
- Internet of Things
- Self and Collateral reports
- Risk screens
- Quick reference
 - Drug side effects & interactions
 - Diagnostic reference
 - Visual education

69



Tools & Technology for Mental Health

- Quality of life measures
- Symptom measures – depression, anxiety
- Risk measures – suicide
- Personality questionnaires
- Coping styles, Level of resilience
- Companion Report

70



Tools & Technology for Brain Health

- Paper & Pencil or Computerized
- Screens
- Batteries
- Functional Observation
- What are they measuring? Is it sensitive? Who are they comparing to?

71



Consultations

- Client, Family, Friends, Teachers, Coaches, Employers
- Circle of Care
- Observation
- Other health care reports

72

Environment & Context

- Physical accessibility
 - Home safety
 - Assistive equipment
 - Home modifications
-
- Understanding the social, political, legal environments

73

Referrals

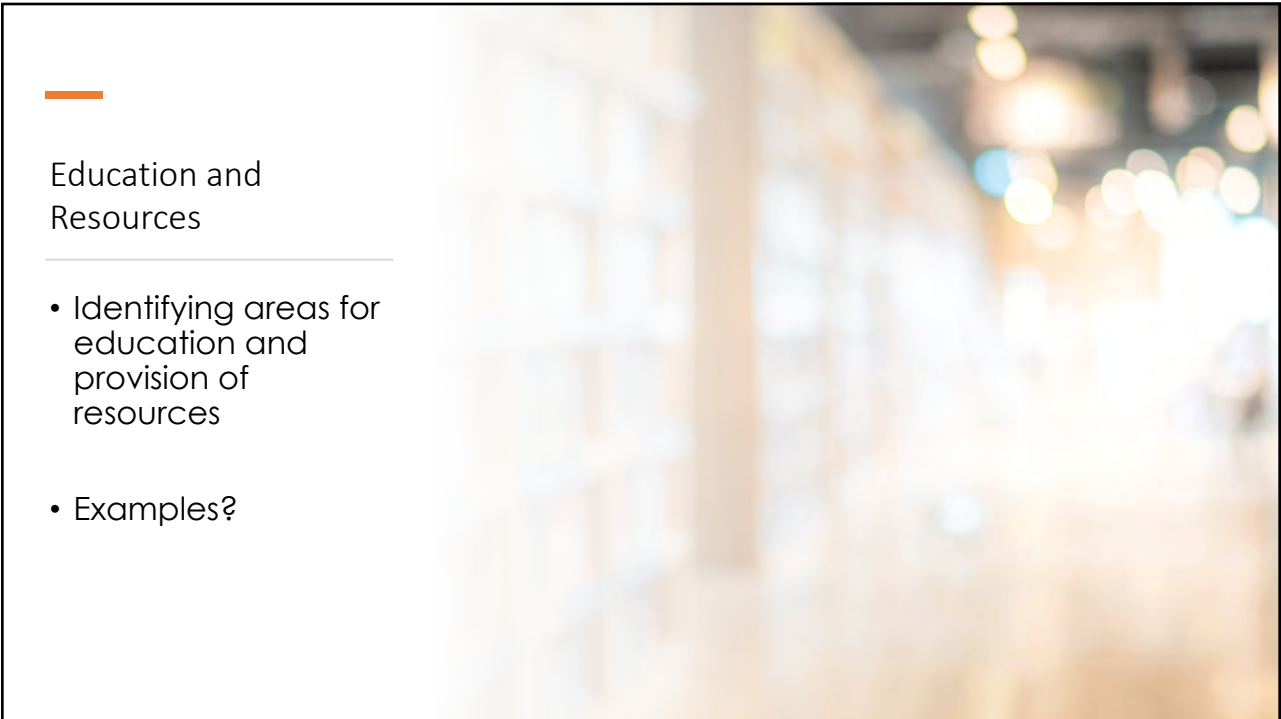
How do you decide who to consult with?

- Further sessions with client
- Family/Friends
- Health providers

Canada's Health Care Providers, CIHI

- <https://www.cihi.ca/en/health-workforce>
- <https://www.cma.ca/canadian-specialty-profiles>

74



Education and Resources

- Identifying areas for education and provision of resources
- Examples?

75



Update your Persona's Assessment Plan

5 minutes

BrainFx

76

Health Coaching Plan

77

Interpretation of Results

What do I know? What do I not know?

Who do I need to consult with?

Where are the strengths? Where are the challenges?

What requires intervention? What does not?

Can it be cured? Or rehabilitated?

Remediated? Compensated?

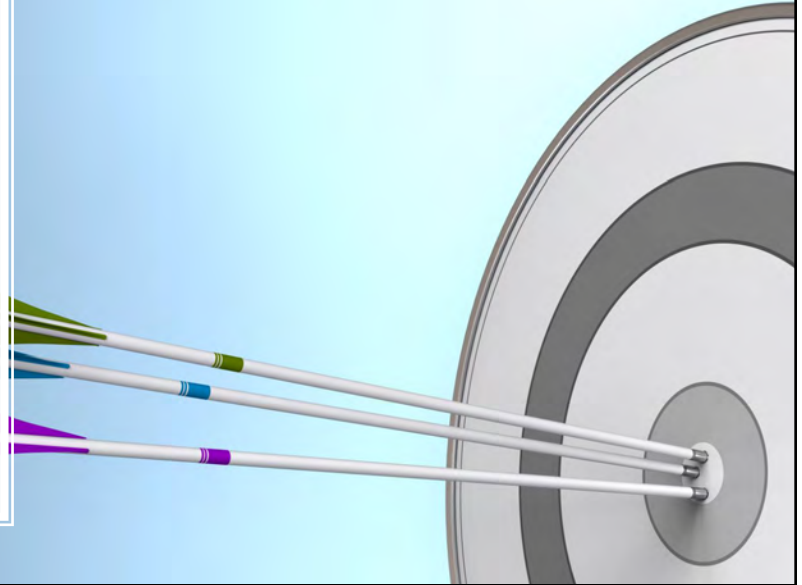
Is there rehab readiness?

What resources are available?

78

Goal Setting

- Prioritizing concerns
- Creating Goals: SMMART
- Coordinated Care Plan
 - Strategies and activities that will support those results (EBP)
 - Objectives with Results
 - Circle of Care or Resources needed to achieve the above
- What are your outcome measures?
- The use of reflection with your client



79



Update your Persona's Health Coaching Plan

10 minutes

BrainFx

80

Case Study: Hannah

81

Reflections

82

Q&A

Thank you!

tmilner@brainfx.com

