Health coach evaluation checklist

*Use this modifiable checklist to evaluate the on-the-job performance of health coaches in your practice.*

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| Date: | | Evaluator: |
| Health coach:  .name: | | |
| Preparedness of the health coach *(ask these questions before the visit with the patient)* | | |
|  | Coach has made a warm reminder call and encouraged patient to bring in medication bottles | |
|  | Coach knows patient’s latest test results | |
|  | Coach can describe patient’s most recent action plan | |
|  | Coach can name his/her goals for the visit | |
| Comments: | | |
| Greeting | | |
|  | Coach gives the patient a professional greeting | |
|  | Coach introduces him/herself if needed and explains the plan for the session | |
| Comments: | | |
| Setting the agenda for the coaching visit | | |
|  | Coach asks patient what s/he wants to accomplish | |
|  | Coach restates and writes down what s/he heard the patient say | |
|  | Coach asks if the patient has any more questions until the patient has no more to say | |
|  | Coach asks patient if it OK to talk about the coach’s priorities as well | |
|  | Coach asks patient to prioritize discussion topics and select two or three for the day’s session | |
|  | Coach and patient agree on the agenda for the visit | |
| Comments: | | |
| Ask-tell-ask | | |
|  | Coach actively listens without interrupting | |
|  | Coach’s comments, tone and facial expressions are friendly, accessible and not judgmental | |
|  | Coach asks patient questions relevant to the topic at hand | |
|  | Coach provides information or advice only when patient asks or doesn’t know | |
|  | Coach provides accurate information | |
|  | If coach does not know information, says, “I don’t know but I will find out and get back to you.” | |
|  | Coach takes advantage of learning moments to ask questions  (e.g., “What is your goal for your blood pressure?”) | |
| Comments: | | |

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| Medication reconciliation | | |
|  | Coach reviews one medication at a time and covers   * name * dose * purpose of medication * how often to take it * whether it is being taken as prescribed * why it is not being taken as prescribed (if applicable) * if refills are needed (unless the practice does [synchronized prescription renewals](https://www.stepsforward.org/modules/synchronized-prescription-renewal)) | |
|  | Coach repeats process for each medication | |
|  | If needed, coach helps patient develop an action plan to increase adherence | |
| Comments: | | |
| Action plan | | |
|  | Coach asks the patient what they want to work on (e.g., healthy eating, physical activity, medication adherence, or something else the patient is concerned about) | |
|  | Coach helps patient plan a very specific behavior change (e.g., walking for 15 minutes in the neighborhood after lunch on Mon, Wed, Fri, and Sun)   * what * how * when/which days * where * with whom | |
|  | Coach asks when the patient wants to start the plan | |
|  | Coach asks the patient about his or her confidence on a scale of 1–10 (7 or higher means patient is feeling confident) | |
|  | Coach helps patient identify and troubleshoot barriers | |
|  | Coach sets date/time to follow up | |
| Comments: | | |
| Closing the loop on important points from the coaching visit  Ex. Changes in medications; how to prepare for a lab test, such as the need to fast. | | |
|  | Coach asks patient to retell the information in his or her own words |
|  | Coach asks patient to close the loop regarding:   * medications * lab work * provider advice or recommendations * action plans * health education * care plan * future appointments |
|  | Coach closes the loop using the patient’s agenda and priorities |
|  | Coach closes the loop when uncertain about the patient’s responses |
| Comments: | |

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| Coach-patient interaction | |
|  | Coach warmly greets patient |
|  | Coach makes eye contact |
|  | Coach smiles |
|  | Coach is relaxed |
|  | Coach speaks slowly and clearly |
|  | Coach does not make qualitative judgements (e.g., “What are you goals for your blood pressure?” rather than “Your blood pressure is good.”) |
| Comments: | |
| Overall comments or recommendations for improvement: | |

The University of California San Francisco Center for Excellence in Primary Care Health Coaching Observations worksheet. <http://cepc.ucsf.edu/sites/cepc.ucsf.edu/files/Health_Coach_Observation_14-0602.pdf>. Updated 2012. Accessed December 7, 2015.

*Source: AMA. Practice transformation series: health coaching. 2016.*