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 visitEx. 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.*