



## The 10 Building Blocks of Primary Care

# Health Coach Observation Checklist

### Background and Description

The Health Coach Observation Checklist is designed to assess the knowledge and skills needed by health coaches to perform in their role. It consists of a checklist of the basic tasks or knowledge needed by a health coach, including setting the agenda, ask-tell-ask, medication reconciliation, developing an action plan, closing the loop, and general communication with patients.

### Instructions

The checklist is used during an observations of a health coach. It can be used soon after the health coach is trained to assess knowledge and skills learned, or after the health coach has been practicing for several months for skills reinforcement. Check off each item as you observe. Write N/A if it does not apply to the particular observation session. After each observation, make time to discuss the visit and identify strengths and areas for improvement. We have also found it useful to ask health coaches to observe each other and provide feedback, and they often come away with new ideas.

### UCSF Center for Excellence in Primary Care

The Center for Excellence in Primary Care (CEPC) identifies, develops, tests, and disseminates promising innovations in primary care to improve the patient experience, enhance population health and health equity, reduce the cost of care, and restore joy and satisfaction in the practice of primary care.

### Acknowledgments

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## Health Coach Observation

Health Coach: \_\_\_\_\_

Date: \_\_\_\_\_

<b>Preparation (Ask prior to visit)</b>	
<input type="checkbox"/>	Coach knows that preventive and chronic care patient is due for
<input type="checkbox"/>	Coach has made warm reminder call and reminded patient to bring in medication bottles
<input type="checkbox"/>	Coach knows patient's latest numbers
<input type="checkbox"/>	Coach can describe patient's most recent action plan
<input type="checkbox"/>	Coach can name his/her goals for the visit
Comments:	
<b>Greeting</b>	
<input type="checkbox"/>	Coach gives the patient a VIP greeting.
Comments:	
<b>Setting the Agenda</b>	
<input type="checkbox"/>	Coach asks patient what s/he want to talk about.
<input type="checkbox"/>	Coach restates what s/he heard patient say
<input type="checkbox"/>	Coach asks to saturation (until the patient has no more to say).
<input type="checkbox"/>	Coach asks patient if it OK to talk about things coach wants to talk about (setting the agenda).
<input type="checkbox"/>	Coach asks which 2-3 items are most important to the patient and writes list for provide that shows those items first.
<input type="checkbox"/>	Coach and patient set the agenda for the visit using both patient and coach items
<input type="checkbox"/>	Coach takes things off the list that s/he can address.
Comments:	

<b>Ask-Tell-Ask</b>	
<input type="checkbox"/>	Coach listens without interrupting
<input type="checkbox"/>	Coach’s comments, tone, and facial expressions are friendly and not judgmental
<input type="checkbox"/>	Coach engages in reflective listening – uses patient’s words as cue for the next sentence
<input type="checkbox"/>	Coach asks patient questions relevant to the topic at hand.
<input type="checkbox"/>	Coach provides information or advice <b>ONLY</b> when patient asks or patient doesn’t know.
<input type="checkbox"/>	Coach provides accurate information.
<input type="checkbox"/>	Coach did not know the information and said, “I don’t know but I will find out and get back to you”.
<input type="checkbox"/>	Coach takes advantage of learning moments to ask questions (“What is your goal for your blood pressure?”)
Comments:	
<b>Medication Reconciliation (med-rec)</b>	
<input type="checkbox"/>	Coach reviews one medication at a time
<input type="checkbox"/>	Asks name
<input type="checkbox"/>	Asks dose;
<input type="checkbox"/>	Asks what med is for;
<input type="checkbox"/>	Asks how often to take it;
<input type="checkbox"/>	Asks if they take it as prescribed;
<input type="checkbox"/>	Discusses reasons not taking as prescribed;
<input type="checkbox"/>	Asks if patient needs refills
<input type="checkbox"/>	Coach repeats process for each medication
<input type="checkbox"/>	If patient needs help with and is interested in improving medication adherence, asks if patient wants to make an action plan.
Comments:	

<b>Action Plan</b>	
<input type="checkbox"/>	Coach asks the patient what they want to work on.
	<b>Coach helps patient plan...</b>
<input type="checkbox"/>	What
<input type="checkbox"/>	How
<input type="checkbox"/>	Which days
<input type="checkbox"/>	Where
<input type="checkbox"/>	With whom
<input type="checkbox"/>	Coach asks when the patient wants to start.
<input type="checkbox"/>	Coach asks the patient about their confidence on a scale of 1–10 (7 or higher means patient is feeling confident).
<input type="checkbox"/>	Coach sets date/time to follow up.
<input type="checkbox"/>	Coach helps patient troubleshoot barriers.
Comments:	
<b>Closing the Loop</b>	
<input type="checkbox"/>	Coach asks patient to retell the information, in a respectful manner.
	<b>Coach asks patient close the loop about...</b>
<input type="checkbox"/>	Medications
<input type="checkbox"/>	Action plans
<input type="checkbox"/>	Health education (e.g., Know your numbers)
<input type="checkbox"/>	Care plan
<input type="checkbox"/>	Appointments
<input type="checkbox"/>	Coach closes the loop around patient's agenda
<input type="checkbox"/>	Coach closes the loop when uncertain about what the patient said
Comments:	

**Coach/Patient Interaction**

- |                          |                                 |
|--------------------------|---------------------------------|
| <input type="checkbox"/> | Coach warmly greets patient     |
| <input type="checkbox"/> | Coach makes eye contact         |
| <input type="checkbox"/> | Coach smiles                    |
| <input type="checkbox"/> | Coach is relaxed                |
| <input type="checkbox"/> | Coach speaks slowly and clearly |

Comments:

**Health Coach Role**

- |                          |   |
|--------------------------|---|
| <input type="checkbox"/> | Coach does NOT provide qualitative judgment (Rather than “Your blood pressure is <u>good</u> .” Health coach can use “Know your numbers” questions. |
|--------------------------|---|

Comments:

**Main points from medical visit that health coach should close loop on (check off as you hear coach close the loop):**

**Appointments/labwork/referrals:**

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**Medications:**

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**Provider advice:**

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**Health coach follow up:**

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**Take home messages**