



The COACH Project (COPD Optimization And Concordance with Health coaches): Health Coach Skills Checklist

DIRECTIONS FOR COMPLETING THE SKILLS CHECKLIST

This skills checklist is designed to assess the fidelity of health coaching skills of Project Implementation Teams participating in the COPD Optimization And Concordance with Health coaches (COACH) project. The instrument may be utilized during trainer site visits or by the supervisor on site, and can serve as a tool to provide tailored feedback to participants during role-play.

Name: _____ Date: _____ Person Observing: _____

Skill	Skills Checklist
Setting the Agenda	▫ Coach asks patient what they want to discuss during visit ▫ Coach confirms patient's item(s) ▫ Coach asks for additional items from patient until no more ▫ Coach shares provider's concern(s) and coach's own concern(s) ▫ Coach asks patient for permission to talk about provider's concern(s) and coach's concern(s) after discussing patient's concern(s) ▫ Coach prioritizes items when there are too many items ▫ Coach summarizes prioritizes agenda items
Ask-Tell-Ask	▫ Coach starts with open-ended question ▫ Coach provides information as needed ▫ Coach follow-ups by asking other open-ended question or closing the loop ▫ Coach balances asking and telling throughout ▫ Coach provides information only when patient asks or doesn't know
Closing the Loop	▫ Coach asks patient to restate (in patient's own words) information covered ▫ Coach closes the loop on any information that was previously unknown to patient ▫ Coach closes the loop on any information that patient previously misunderstood

Inhaler Technique	▫ Assess knowledge of rescue versus controller inhalers ▫ Asks patient to demonstrate use of inhaler ▫ Accurately identifies steps performed incorrectly ▫ Demonstrates correct use and areas for improvement ▫ Asks patient to demonstrate again until performed correctly ▫ Assess knowledge of how to take inhalers ▫ Probes for barriers to regular use of controller inhalers
Medication Reconciliation	▫ Coach asks patient about name of medication ▫ Coach asks patient about purpose of medication ▫ Coach asks patient about medication dose ▫ Coach asks patient how they're taking medication ▫ Coach asks patient how medication was prescribed ▫ Coach asks what is preventing patient from taking medication as prescribed ▫ Coach asks patient how many refills are left ▫ Coach asks patient how to get refills ▫ Coach closes the loop on information not known
Self-Management goals	▫ Coach asks patient what they want to work on ▫ Coach establishes specifics of plan (e.g. who, what, where, when, how, how often, etc.) ▫ Coach assesses patient confidence in plan ▫ Coach establishes start date ▫ Coach closes the loop on information covered ▫ Coach only provides suggestions when patient is unsure or requests ideas ▫ Coach offers to follow up as needed ▫ Coach helps patient navigate potential barriers
COPD Action Plan	▫ Coach asks patient about symptoms that may have led to previous emergency room visits ▫ Coach probes about potential triggers that may have caused those symptoms to start (e.g. stress, smoking more, cold, new cleaning chemical, etc.) ▫ Coach provides information about the benefits of preventing exacerbations that the patient may not have otherwise known ▫ Coach establishes specifics of COPD action plan (e.g. green, yellow, red zone) ▫ Coach explores reasons why the patient may not seek help in an exacerbation and helps mitigate potential concerns ▫ Coach closes the loop on information covered
Smoking Cessation	▫ Coach asks for permission to discuss smoking cessation ▫ Coach assess patient's readiness for smoking cessation ▫ Coach has conversation about smoking in general ▫ Coach does additional probing about concerns about quitting, if pre/contemplative ▫ Coach assess what modality the patient would like to try, if ready ▫ Coach shares resources and create an action plan, if applicable.