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 observation 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 disseimates 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
The UCSF Center for Excellence in Primary Care would like to acknowledge Amireh Ghorob, MPH; Thomas Bodenheimer, MD, MPH; and Rachel Willard-Grace, MPH for their contribution to this work.

Copyright 2014, The Regents of the University of California
Created by UCSF Center for Excellence in Primary Care.

All rights reserved. Individuals may photocopy these materials for educational, not-for-profit uses, provided that the contents are not altered and that attribution is given to the UCSF Center for Excellence in Primary Care. These materials may not be used for commercial purposes without the written permission of the Center for Excellence in Primary Care.
## Health Coach Observation

**Health Coach:** ____________________________  **Date:** ____________________________

### Preparation (Ask prior to visit)
- [ ] Coach knows that preventive and chronic care patient is due for
- [ ] Coach has made warm reminder call and reminded patient to bring in medication bottles
- [ ] Coach knows patient’s latest numbers
- [ ] 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 VIP greeting.

**Comments:**

### Setting the Agenda
- [ ] Coach asks patient what s/he want to talk about.
- [ ] Coach restates what s/he heard patient say
- [ ] Coach asks to saturation (until the patient has no more to say).
- [ ] Coach asks patient if it OK to talk about things coach wants to talk about (setting the agenda).
- [ ] Coach asks which 2-3 items are most important to the patient and writes list for provide that shows those items first.
- [ ] Coach and patient set the agenda for the visit using both patient and coach items
- [ ] Coach takes things off the list that s/he can address.

**Comments:**
### Ask-Tell-Ask

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Coach listens without interrupting</td>
</tr>
<tr>
<td></td>
<td>Coach’s comments, tone, and facial expressions are friendly and not judgmental</td>
</tr>
<tr>
<td></td>
<td>Coach engages in reflective listening – uses patient’s words as cue for the next sentence</td>
</tr>
<tr>
<td></td>
<td>Coach asks patient questions relevant to the topic at hand.</td>
</tr>
<tr>
<td></td>
<td>Coach provides information or advice ONLY when patient asks or patient doesn’t know.</td>
</tr>
<tr>
<td></td>
<td>Coach did not know the information and said, “I don’t know but I will find out and get back to you”.</td>
</tr>
<tr>
<td></td>
<td>Coach takes advantage of learning moments to ask questions (“What is your goal for your blood pressure?”)</td>
</tr>
</tbody>
</table>

**Comments:**

### Medication Reconciliation (med-rec)

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Coach reviews one medication at a time</td>
</tr>
<tr>
<td></td>
<td>Asks name</td>
</tr>
<tr>
<td></td>
<td>Asks dose;</td>
</tr>
<tr>
<td></td>
<td>Asks what med is for;</td>
</tr>
<tr>
<td></td>
<td>Asks how often to take it;</td>
</tr>
<tr>
<td></td>
<td>Asks if they take it as prescribed;</td>
</tr>
<tr>
<td></td>
<td>Discusses reasons not taking as prescribed;</td>
</tr>
<tr>
<td></td>
<td>Asks if patient needs refills</td>
</tr>
<tr>
<td></td>
<td>Coach repeats process for each medication</td>
</tr>
<tr>
<td></td>
<td>If patient needs help with and is interested in improving medication adherence, asks if patient wants to make an action plan.</td>
</tr>
</tbody>
</table>

**Comments:**
## Action Plan

- Coach asks the patient what they want to work on.
  - **Coach helps patient plan...**
  - What
  - How
  - Which days
  - Where
  - With whom
  - Coach asks when the patient wants to start.
  - Coach asks the patient about their confidence on a scale of 1–10 (7 or higher means patient is feeling confident).
  - Coach sets date/time to follow up.
  - Coach helps patient troubleshoot barriers.

**Comments:**

## Closing the Loop

- Coach asks patient to retell the information, in a respectful manner.
  - **Coach asks patient close the loop about...**
  - Medications
  - Action plans
  - Health education (e.g., Know your numbers)
  - Care plan
  - Appointments
  - Coach closes the loop around patient’s agenda
  - Coach closes the loop when uncertain about what the patient said

**Comments:**
### Coach/Patient Interaction

- [ ] Coach warmly greets patient
- [ ] Coach makes eye contact
- [ ] Coach smiles
- [ ] Coach is relaxed
- [ ] Coach speaks slowly and clearly

**Comments:**

### Health Coach Role

- [ ] Coach does NOT provide qualitative judgment (Rather than “Your blood pressure is **good**.” 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