

MARQUEE HEALTH COACH PROGRAM MANUAL

NEW COACHING MEMBER INTAKE FORM

*Our health coaching programs are available via telephone, email and video. The purpose of the coaching relationship is to help the member create a personalized plan to help them make changes in their health behaviors and reach their health goals.

The first step is to complete our coaching Intake assessment (or tobacco questionnaire if they are enrolling in UBreathe) housed in the Survey Monkey secured site. Some groups do not use our Intake assessment (Limeade, WellRight, BAS Health, EnhancedCareMD and Propel). When completed, member is assigned to a coach, and coach contacts member within within 4 to 5 business days. Coach and member then work together to set a Goal and Action Steps that will detail out the plan to help the member make changes.

At Intake:

1. Get the caller's name, status (EE or Spouse), DOB and **FULL NAME OF EMPLOYER GROUP OFFERING COACHING**. If they are the spouse also get the name of the EE and their DOB. Confirm that you have spelled their name correctly.
2. Explain the above*.
3. Clarify if the member wants to work with their coach via email or telephone (**if their program is strictly email or strictly phone coaching, please make them aware of this**)
4. Take down their email address and telephone. Confirm that you have captured their phone number and email address correctly.
5. If they prefer phone or video coaching, ask if there are days/times that work best for them (it is not a guarantee that they will be called as requested, but we will make every effort). Ask for their time zone. Let them know their coach will reach out within the next 4 to 5 business days to introduce themselves and schedule their first phone or video coaching session. ****Coaches reach out as soon as you can please to send coach bio and date/time of first coaching session. Only use the 4 to 5 business day buffer if absolutely necessary.**
6. If they selected Email coaching -Let them know their coach will send their first email Session within 4 to 5 business days. Explain that completing a coaching session consists of replying to the Coach's email.
7. Email the enrollment info (see Enrollment Instructions document for template and details) to LROD, Rita Ravenna, Yesenia Perez, and Cindy Moro with any additional notes of info provided by the member.
8. Some groups will require extra information. **Here are some examples (but refer to any info sent out about the groups with special enrollment needs):**
 - a. Propel groups (Green Sky and Rolls Royce)
 - i. Employee ID number
 - b. Borden
 - i. Employee ID number
 - ii. SS#
 - iii. DOB

- c. Advocate Health Care (check eligibility file)
 - i. ID number
- d. Dyno Nobel
 - i. Are they a New Hire
 - ii. EEID#
- e. KBS Industries (Guardian, Georgia Pacific, Molex, Koch, Infor)
 - i. EEID number