# Marquee Health. Health Coach Checklist

## New Member Assigned

- Coach Adds to Coaching Member Spreadsheet
- Coach Adds to CoachSpect
    - Check Awaiting Enrollment for current Case before creating New Case
    - Add all demographic information
    - Request any necessary demographic information that is needed
- Coach Adds to Calendar (phone coaching)

## *Phone Coaching Member Steps*

- ✓ Coach Reaches out within 1 to 2 business days with introductory email and scheduled date and time of call via email or via phone.
- ✓ Coach calls member as scheduled. Completes coaching session. Coach follows up with email that includes next Call Date/Time
- ✓ Coach calls member as scheduled (if no answer on first try, try again in 3 – 5 minutes). If member misses call, Coach leaves detailed voice message with the date and time of the next call. Coach sends email with this information. Coach calls as stated.
- ✓ Coach updates CoachSpect in real time during phone conversation. Enter each attempt as separate entry.
- ✓ Coach Adds Phone notes to CoachSpect
- ✓ Coach Adds Name/Initials to phone call entry
- ✓ Coach updates Goal and Activities after every coaching session (or as appropriate).
- ✓ Coach updates Task and Calendar with next coaching session Date/Time and any email follow ups
- ✓ Coach labels completed Sessions
- ✓ Coach Tracks WellRight Activities (if applicable). Coach Updates WellRight Portal as and if appropriate.
- ✓ Coach reports session/program completions in New-Report_Program_Completions_MyRewards_Other Excel document or other Manual Reports (when applicable).

**Coach reviews the Client information in CoachSpect to review deadlines, reporting needs, etc. with every member every time.**

## *Email Coaching Member Steps*

- ✓ Coach reaches out with Session 1 within 3 business days. Cushion of up to 5 business days can be used if necessary.

- ✓ Coach replies to members emails within 3 business days. Cushion of up to 5 business days can be used if necessary.
- ✓ If program asks for 1 session per week, coach replies as appropriate
- ✓ Coach updates Goal and Activities after every coaching session (or as appropriate).
- ✓ Coach updates Task
- ✓ Coach labels completed Sessions
- ✓ Coach Tracks WellRight Activities (if applicable). Coach Updates WellRight Portal as and if appropriate.
- ✓ Coach reports session/program completions in New-Report_Program_Completions_MyRewards_Other Excel document or other Manual Reports (when applicable).

**Coach reviews the Client information in CoachSpect to review deadlines, reporting needs, etc. with every member every time.**

## *Common Terms*

- ❖ "Comp IHA" = IHA is complete; please retrieve in SurveyMonkey
- ❖ "Comp questionnaire" = Tobacco questionnaire is complete; please retrieve in SurveyMonkey
- ❖ "Sent IHA" = IHA has been sent. At the time member was assigned, the survey had not yet been completed. Please check Survey Monkey periodically to see if your member completes.
- ❖ "Sent Questionnaire" = At the time member was assigned, the survey had not yet been completed. Please check Survey Monkey periodically to see if your member completes.
- ❖ Coaches do not send IHA or Tobacco Questionnaire links
- ❖ "Requested method" = Method of communication has been requested. At the time member was assigned, they had not yet replied. Please do not wait to reach out. Go ahead and reach out to member per the protocol and ask member which method they prefer.
- ❖ "Requested program" = Program selection has been requested. At the time member was assigned, they had not yet replied. Please do not wait to reach out. Go ahead and reach out to member per the protocol and ask member which program they want to focus on.
- ❖ "Requested ID" = ID was not provided at enrollment. Coach obtains from coaching member

## *Incentive Reason for Enrollment*

- ❖ RAS – Select when participant is enrolled to complete coaching as their Reasonable Alternative Standard
- ❖ Tobacco RAS - Select when participant is enrolled in UBreathe Tobacco Cessation to complete coaching as their Reasonable Alternative Standard

- My Rewards – Select when Client has a My Rewards program that incentivizes coaching as an approved activity
- Wellness Credits/Points- Select when participant is receiving credit/points for participation via an internal program or other means (NOT MY REWARDS)
- No Incentive – Select when coaching is not incentivized
- Other – Select if reason does not fall under previous options

### *Completion Reason*

- Completed Program – Select when member has satisfied program requirements. If coaching is not incentivized, Select this when member has indicated they are ready to end coaching.
- Member Ended Program – Select when member enrolled for required purposes (ie RAS) and indicates they do not want to participate/complete the program.
- Inactivity – Select when member does not engage initially or stops engaging
- No Longer EE – Select this when member stops engaging or ends coaching because they are no longer employed by the Client.
- Company Termed – Select this when coaching ends because the Client is no longer a Wellness Client of MH
- Custom – Select this if the other options are not adequate. Add in reason
- Custom – Select this for 1 time bio review or 1-time coaching sessions