

Health Coach Competency Tool

Competency	Rating 1 = low 5 = high
Domain 1: Clinical Practice Skills	
1) Introduces HC role accurately {time frame, helping with long term 't conditions (LTC), part of the clinic team, notes and safety)	
2) Demonstrates Very important Patient {VJP} greeting skills (smile, eye contact, warmth)	
3) Asks permission for consult and any other plan, agenda item	
4) Teaches/supports patient to set agenda	
5) Uses "Ask-tell-ask" process	
6) Uses "4 questions" process for long-term conditions"	
7) Uses "know your numbers" effectively with patients	
8) Knows how to close the loop for new information/supported appointment	
Develops action plans with patients	
9) Assesses patient confidence level for action plan.	
10) Provides patient with copy of action plan where appropriate	
11) Works with patients in culturally appropriate manner	
12) Plans patient follow-up appropriately	
13) Provides phone-based interventions/follow ups	
14) . Provides appointment reminder calls/texts where relevant	
15) . Friendly and non-judgmental tone, body language and expression	
16) . Normalises relationship between mood and long-term conditions well	
17) Describes self-management accurately and refers to courses where ""applicable	
18) Uses and explains outcome instruments (DUKE, PHQ9) accurately and efficiently	
19) Provides medication reconciliation with feedback to practice when requested	

20) . Competently uses diabetes 'stop light' HbA1c with diabetic patients	
21) Ask about smoking and share New Zealand A~B-C model of smoking cessation confidently if required-make a plan	
22) Models pleasant activities/events planning with patients	
23) Guides and models relaxation activities	
24) Shares one pagers appropriately and makes plan based on patient choice	
25) . Instructs and demonstrates breathing exercises (diaphragmatic, pursed lip, square breathing, 'C' courage breathing)	
Domain 2: Practice Management Skills	
27. Attends and participates in relevant team meetings	
28. Maintains current list of community resources	
29. Works with focal NGO's and community services	
30. Works collaboratively with general practice team In workflows	
31. Works to enhance efficiency of HIP/ BHC/HC services	
32. Assists HJP/BHC with outcomes, enabling warm handovers	
33. Completes most visits within 15- and 30-minute time periods	
34. Available for same-day consults/ warm handovers from nurses, GP's and HIP/BHC's	
35. Consistently hands-over complex/high PHQ-9 patients to HIP/BHC or GP/Mental health nurse	
36. Completes and knows referral pathways to internal and external agencies/teams	
Domain 3: Documentation	
37. Completes timely documentation of all patient-related services	
38. Documentation includes outcome instrument results {DUKE, PHQ-9, etc}	
39. Uses data from Patient Management Systems (PMS) i.e. Medtech to explain basic health indicators as appropriate	
40, Completes documentation in PMS/Medtech on the day service provided	
Team Performance Skills	

Te Tumu Waiora

41. Understands and operates well in GP/nurse clinic	
42. Understands team roles-works closely with HIP/BHC, GP & nurses	
43. Stocks patient education materials related to Wellbeing services 44. Develops and updates posters related to Wellbeing services	
45. Leaves information as to location and time of return, when away	
46. Completes daily management sheet-Records name, referral question, PhQ9, NHI number for WHO's from GPS and RNs etc	
47. Accurately describes the role of HC and scope of HC interventions to GP team members	
48. Communicates information accurately among team members	
49. Participates well In creating, evaluating, implementing Wellness/LTC pathways and workflows	
50. Practices self-care and supports self-care among team Administrative Skills	
51. Understands relevant policies and procedures of /GP Wellness Services	
52. Understands and applies risk management protocols when appropriate	
53. Routinely completes all coding requirements	

Domain	Total Score
Domain 1: Clinical Practice Skills	
Domain 2: Practice Management Skills	
Domain 3: Documentation	
Total	

*Based on the Health Coach Training Curriculum developed at the Centre for Excellence in Primary Care (CEPC) and the Primary Care Behavioural Health Model {Robinson & Reiter, 2015) for full integration of behavioural health services into general practice.