

Patient Centered Coaching Guide

small **STEPS** 
make a  **BIG** *difference*



Healthy BMI Patient Feedback

Note: Use the response most appropriate to the patient's status/situation.*

BMI 18–24.9

OARS (Open questions; Affirm, Reflect, Summarize)	Goal/Notes
<p>Use positive messages and ask permission.</p> <p><i>“You are at a healthy weight for a person of your height.</i></p> <p><i>That’s great. Keeping a healthy weight and watching for unwanted weight gain is important to prevent illness.</i></p> <p><i>It seems like you are doing the things you need to maintain a healthy weight. That’s great.”</i></p>	<p>Prevent unwanted weight gain:</p> <ul style="list-style-type: none"> • Help patient understand BMI is an important health measure and that all patients are screened for BMI. • Encourage patient to continue healthy habits to maintain current weight. • Encourage patient to monitor his or her weight at home and to take small steps if weight increases over time.

Ask all patients:

“Would you like to talk about a few tips on how to keep yourself at a healthy weight?”

<p>If patient says NO:</p>	<p><i>“When you come back for another physical exam, we will check your BMI again.</i></p> <p><i>Before then, if you have concerns about your weight, give us a call.”</i></p>	<p>Handouts:</p> <ul style="list-style-type: none"> • BMI Patient Education flier
<p>If patient says YES:</p>	<p><i>“People who maintain a healthy weight over time do six key things. I have a handout that tells more about this.</i></p> <p><i>Which of these works for you?</i></p> <p><i>If you start to see a gradual weight gain, you might consider doing something different on the list.</i></p> <p><i>In the future, we will check your BMI again. In the meanwhile, if you have concerns about your weight, give us a call.”</i></p>	<p>Handouts:</p> <ul style="list-style-type: none"> • BMI Patient Education flier <p>Control the Creep:</p> <ul style="list-style-type: none"> • Weight Maintenance Tips

Unhealthy BMI Patient Feedback

*Note: Use the response most appropriate to the patient's status/situation.**

BMI 25–39

OARS (<i>Open questions; Affirm, Reflect, Summarize</i>)	Goal/Notes
<p>Use Positive Messages</p> <p><i>“We are checking all our patient’s BMI just like we do blood pressure because it is an important sign about your health.</i></p> <p><i>Because your BMI indicates your weight is unhealthy for a person of your height, the doctor or physician’s assistant will be talking more with you about this today.”</i></p>	<ul style="list-style-type: none">• Help patient understand that BMI is an important health measure and that all patients are screened.• Make patient aware they are at an unhealthy weight and that their doctor or physician’s assistant will be talking with them more about this today.



Patient Follow up—Lifestyle Action Plan

1. Open the conversation—ask permission.

“Hello, this is _____ from your doctor’s clinic. Is it all right to check in with you now to see how you are doing on the action plan you made during your annual exam (last visit to the office)? This will take about 10 to 15 minutes.”

*Note: Use the response most appropriate to the patient’s status/situation.**

Patient Status	OARS (Open questions; Affirm, Reflect, Summarize)	Tips/Notes
If patient says NO:	<p><i>“I understand this isn’t a good time for you to talk about this.</i></p> <p><i>If you change your mind or if there is a better time, please call us at_____.</i></p> <p><i>I’d be glad to talk with you later, or we can set up another meeting with your doctor.”</i></p>	<p>No convincing, persuading or arguing with the patient.</p>
If patient says YES:	GO TO STEP 2.	

2. Explore patient success and barriers.

- Praise all attempts at change.
- Affirm people’s ability to change.

“When you were here for your annual exam, you completed an action plan. It looks like you decided to work on_____.

“How is that going for you?”

“What community resources have you tried using?”

“What has or hasn’t worked for you?”

Patient Status	OARS <i>(Open questions; Affirm, Reflect, Summarize)</i>	Tips/Notes
Successful	<p><i>“That took a lot of hard work and persistence. You are making great progress and every small step counts.</i></p> <p><i>Have you thought about how you can reward yourself for your hard work? What do you think would feel good and healthy for you?”</i></p>	<ul style="list-style-type: none"> • Praise success. <p>Healthy rewards:</p> <ul style="list-style-type: none"> • Buy favorite music/movie. • Go out for a healthy dinner. • Take a weekend trip. • Get a massage, pedicure, manicure.
Somewhat or not successful	<p><i>“It’s sometimes hard to make a change because we are learning or trying new things. A lot of people who have been successful have tried many times and many things ... What did you learn from this?</i></p> <p><i>Tell me what’s been going on and where you have had some problems.</i></p> <p><i>What could you do differently in the future/next time?</i></p> <p><i>Is there something else that has worked for you in the past or you think might be worth trying now?”</i></p>	<ul style="list-style-type: none"> • Every failed attempt or try to change is a learning opportunity. • Praise every try. Brainstorm what might work better next time.
Setback/barriers to success	<p><i>“There is usually more than one way to take action. Can I share with you what has worked for other people?</i></p> <p><i>You are the best judge of what works for you.</i></p> <p><i>Let’s go through some other ideas that might work for you.”</i></p>	<ul style="list-style-type: none"> • Brainstorm options or solutions. • Allow patient to choose.
Expresses lack of self-confidence or ability to make the change	<p><i>“How important is this to you?</i></p> <p><i>How much do you want to _____?</i></p> <p><i>How confident are you that you can make this change?</i></p> <p><i>What strengths do you have that will help you _____?</i></p> <p><i>Who can you enlist to help support you to _____?”</i></p>	<ul style="list-style-type: none"> • If a patient believes that she/he has the ability to change, the likelihood of change occurring is greatly increased.
Argumentative, stubborn, resistant	<p><i>“I don’t understand everything you’ve told me. Can you tell me more?</i></p> <p><i>You don’t think changing _____ would work for you?</i></p> <p><i>You think now might not be the time to make changes?</i></p> <p><i>I am concerned about _____, but you are the one in control.</i></p> <p><i>This is your decision. What would you like to do?”</i></p>	<ul style="list-style-type: none"> • Allow patient to express their concerns and offer a new perspective. • Listen carefully. • GO TO STEP 3.

3. Ask about next steps—let the patient choose.

“So, what would you like to do next? Would you like more help with this?”

*Note: Use the response most appropriate to the patient’s status/situation.**

Patient Status	OARS (Open questions; Affirm, Reflect, Summarize)	Tips/Notes
Not sure they can make the small change they committed to on their action plan (feels defeated, discouraged)	<p><i>“Are you feeling discouraged?”</i></p> <p><i>If you feel like this is too much for you to handle/do right now, what do you think might be more realistic for you?</i></p> <p><i>When the doctor discussed an action plan with you, there were several other small steps you could take to make a positive change.</i></p> <p><i>Would you consider trying something else?</i></p> <p><i>What ideas do you have?”</i></p>	<p>Do not change the action plan behavior that the patient set with the provider, unless there is a serious obstacle to success.</p> <p>INSTEAD</p> <p>Remind patient:</p> <ul style="list-style-type: none"> • Change takes times. • Small steps will show results over time.
<p>Wants to alter his or her behavior change goal</p> <p>Wants/needs more intense support</p>	<p><i>“Here’s some other options to explore. What would work for you?”</i></p> <ul style="list-style-type: none"> • Visit with a dietician for weight loss program/diet consultation. • Visit a gym to find a personal coach or program. <p><i>I see you have _____health insurance coverage. Have you thought about calling the customer service number to find out if you could get help from a health coach or join a gym at a discount?”</i></p> <p>(Note: Ask only after you’ve checked to be sure the patient has health insurance.)</p>	<ul style="list-style-type: none"> • Suggest trying another small step or resource, find greater support, or scale back to a smaller step. • GO TO STEP 4.

4. Close conversation and set up next steps, if needed.

Show appreciation:

- *“Thank you for your time and willingness to talk today.”*

Voice respect and confidence:

- *“You’re the best judge of what’s best for you.”*
- *“I am confident you can make a change and find a way to do it.”*
- *“Keep up the good work and I will call you (date/time) OR, we’ll see you at the clinic on (date/time).”*

5. Complete Weight and Lifestyle Management Form.

Resources and Strategies for Change

Quit Smoking

Small step strategies for change:

- Avoid places and situations that make me feel like smoking.
- Try nicotine replacement to reduce cravings.
- Other: _____
- Cut down to ____ smokes per day.
- Set a quit date.
- Get help from my doctor or quit plan.

Recommended resources:

<ul style="list-style-type: none">• QUITPLAN Phone Line Helpline hours (CST): 7 a.m.–10 p.m., 7 days a week Work with an experienced, professional phone counselor to help you quit. Make a personalized plan and receive free nicotine patches, lozenges or gum.	1-888-354-7526 TTY 1-877-559-3816 1-888-354-7526 (Spanish)
QUITPLAN Online —<www.quitplan.com>—Offers free support: personalized quit-smoking plans; expert counselors to answer questions; current and former smokers who share the ups and downs of quitting; e-mails celebrating your progress.	

Manage Stress

Small step strategies for change:

- Limit junk food, alcohol, and tobacco.
- Sleep 7–9 hours every day.
- Take deep breaths, meditate, or pray.
- Stay in touch with friends and family.
- Take time every day for myself; read, walk, listen to music, or stretch.
- Other: _____.

Recommended resources:

Group Classes and Home Activities —Offers low cost health and wellness classes including meditation, yoga, and tai chi. Download or call to get a catalog.	763-531-0052
<ul style="list-style-type: none">• Crystal Community Center—<www.crystal.govoffice.com> 4800 Douglas Drive N., Crystal, MN• Robbinsdale Community Education—<www.ced.rdale.org> 8301 47th Ave. N, New Hope, MN 55428• Collage Video—<www.collagevideo.com> Buy home-based yoga and tai chi videos, and DVDs for all ages and abilities.	763-504-6999 763-504-6990 1-800-819-7111
Online Resources —Get information to help recognize stress and tips to manage better.	
<ul style="list-style-type: none">• FamilyDoctor.org (English and Spanish) <www.familydoctor.org/online/famdocen/home/common/mentalhealth/stress>• Mayo Clinic.com—<www.mayoclinic.com/health/stress-management/MY00435>• Online Relaxation Exercises—<www.students.georgiasouthern.edu/counseling/relax/OnlineRelax07.htm> Go to the Georgia Southern University Web site to find a variety of relaxation exercises in the form of audio files that you can play on your computer.	

Be More Active

Small step strategies for change:

- Walk ____ minutes ____ days/week.
- Get up and move for 10 minutes ____ times a day ____ days/week.
- Do more of what you love: dancing, hiking, sports, skating ____ times a day ____ days/week.
- Use the stairs, and add more steps to and from the car, store, school, and work.
- Limit screen time (TV, computers).
- Move when watching TV or movie: Walk in place, dance, stretch, or jump rope.
- Other: _____.

Recommended resources:

<p>Indoor Walking and Activity</p> <ul style="list-style-type: none"> • Crystal Galleria 8 a.m. Monday–Friday; 9 a.m. Saturday; 5542 W. Broadway, Crystal, MN • Brookdale Center 8 a.m.–9 p.m. Monday–Friday; 8 a.m.–8 p.m. Saturday; 8 a.m.–6 p.m. Sunday 1108 Brookdale, Brooklyn Center, MN • Collage Video—<www.collagevideo.com> Purchase home-based workout, yoga, and fitness videos, and DVDs for all ages and abilities. 	<p>763-513-5542</p> <p>763-560-7122</p> <p>1-800-819-7111</p>
<p>Fitness Clubs</p> <ul style="list-style-type: none"> • Curves For Women 3471 W. Broadway Ave., Robbinsdale, MN • Snap Fitness 4070 Lakeland Ave. N., Robbinsdale, MN • YMCA—North Community Branch—ymcatwincities.org 1711 W. Broadway, Minneapolis, MN • YMCA—Northwest Branch—ymcatwincities.org 7601 42nd Ave. N., New Hope, MN 	<p>763-529-0100</p> <p>763-390-1313</p> <p>612-588-9484</p> <p>763-535-4800</p>
<p>Outdoor Activity—City Parks and Recreation departments maintain parks and trails for play and walking. Some departments also offer adult sport/activity programs. Explore the Web site, or call and ask about your activity interests.</p> <ul style="list-style-type: none"> • Crystal Community Center/Parks and Recreation—<www.ci.crystal.mn.us> • New Hope Community Center/Park and Recreation—<www.ci.new-hope.mn.us> • County Parks and Trails—Three Rivers Parks—<www.threeriversparks.org> 	<p>763-531-0052</p> <p>763-531-5151</p> <p>763-559-9000</p>
<p>Group Classes and Activities</p> <ul style="list-style-type: none"> • Community Education Programs — Offers opportunities for variety of fitness classes, open/lap swimming, and indoor walking. Check the Web site or call for information and a current catalog at <www.ced.rdale.org> 	<p>763-504-6999 or 763-504-6990</p>
<p>Online Resources</p> <ul style="list-style-type: none"> • Mayo Clinic—<www.mayoclinic.com/health/exercise/SM00109> Information for low-cost and safe ways to exercise all year <www.mayoclinic.com/health/fitness/MY00396> • National Institute on Aging—<http://nihseniorhealth.gov/exerciseforolderadults/toc.html> You’re never too old to start moving. Learn more about why you need to do it and how to do it safely. 	

Eat Healthier

Small step strategies for change:

- Eat a healthy breakfast every day.
- Eat frequent, small meals.
- Cut down/stop sugary drinks.
- Drink water: ____ glasses/day.
- Eat more fruits and vegetables.
- Eat low-fat milk, cheese, or yogurt.
- Eat out less: ____ times/week.
- Other:_____.

Recommended resources:

<p>Weight Loss Support</p> <ul style="list-style-type: none"> • Weight Watchers—Support for losing and maintaining weight loss through healthy food choices. Enrollment fees apply. Offered at various community locations, including some YMCAs. Find a support group meeting near you at <www.weightwatchers.com> • Overeaters Anonymous—A 12-step program to help individuals end compulsive eating. Face to face or phone support groups are free and open to everyone. For help finding a meeting in the Minneapolis area, leave a phone message or go online at <www.overeaters.org/localmeetings.html> 	<p>800-651-6000 888-540-1212</p>
<p>Farmers’ Markets—Buy fresh, healthy fruits, and vegetables.</p> <ul style="list-style-type: none"> • New Hope Market, 4300 Xylon Ave. N (K-mart parking lot) Saturdays, June 13–October 17, 8 a.m.–1 p.m. • Brooklyn Park Market, Zane Sports Park, 8717 Zane Ave. Wednesdays, June 23–October 20, 3–7 p.m. 	
<p>“Dishing Up Nutrition” Listen on My Talk 107.1 FM radio Offers practical, real-life solutions for healthier eating and living. Saturday, 8–9 a.m.; Sunday, 6–7 p.m.</p>	
<p>Online Resources—Make a personalized eating and exercise plan, track your calories and physical activity. Get menus, recipes, and easy tips to improve your diet, and get you and your family moving.</p> <ul style="list-style-type: none"> • Shape Up America—<www.shapeup.org> • Spark People—<www.sparkpeople.com> • Web MD—<www.webmd.com/diet/healthtool-fitness-calorie-counter> • Dining Out?—<www.fastfoodbook.com>—Free download information about the nutrition and calories for your favorite fast foods and restaurants. • My Healthy Living —<www.myhealthyliving.net>—Find information/guidance about diet, physical activity, smoking, and alcohol use. 	

OARS and Coaching Videos

Open Questions:

Purpose and use:

- Ask “How? When? What?”
- Encourage people to think and pull from the inside.
- Invite more information about the patient’s concerns.
- Use short questions focused on current concerns.

Sounds like:

- *“How have things been going?”*
- *“What was that like?”*
- *“What have you noticed about ____?”*
- *“Hmm ... Interesting. Tell me more.”*
- *“When would you most likely go for a walk?”*
- *“How would you like things to be different?”*
- *“What do you want to do next?”*
- *“How can I help you with that?”*

Affirmations:

Purpose and use:

- Builds people’s confidence in their ability to change
- Provides statements that recognize individual’s strengths, personal qualities, values
- Must be true and real
- Not the same as praise
 - Praise recognizes successful doing
 - Affirmations recognize inner resources and ability to change

Sounds like:

- *“You did the right thing.”*
- *“I noticed that you . . .”*
- *“You showed a lot of patience.”*
- *“You are a brave person to . . .”*
- *“I’m impressed how you found the strength to . . .”*
- *“That took persistence to . . .”*
- *“Thank you for . . .”*

Reflective Listening and Statements:

Purpose and use

- Reflective statements mirror person's words or meaning.
- Listening and reflecting back increases mutual understanding.
- Throughout the conversation, stop to check out what people really mean and have to say.
- See if the speaker's voice turns down at the end of the statement.

Sounds like:

- *"So you feel . . ."*
- *"Sounds like you are thinking/feeling . . ."*
- *"You aren't so sure about . . ."*
- *"You're wondering if . . ."*

Summaries:

Purpose and use:

- They ensure common understanding of information and patient's meaning.
- Use at the point in conversations when shifting to another topic or when a decision or action has been chosen.

Sounds like:

- *"Let me see if I have this right . . ."*
- *"Here's what I've heard, so tell me what I missed . . ."*
- *"Is there anything you want to add or correct?"*
- *"Let me summarize what we've covered so far . . ."*

Sources:

- Ken Kraybill, *Motivational Interviewing: Preparing People for Change*. National Health Care for the Homeless Council, www.nhchc.org
- Health Sciences Institute, *Chronic Care Professional Certification Program Manual*, Fourth Edition, 2008

Online Videos: Health Coaching and Motivational Interviewing

I. Evidence-based health coaching: Applying motivational interviewing in health care

<www.healthsciences.org/Infocus/HSI_InFocus_Videos.html>

Audience: healthcare providers

Online Video Series: “Introduction to Motivational Interviewing and Health Coaching”

1. How can motivational interviewing be applied in health care? (4:43 min)
2. What is motivational interviewing? (4:03 min)
3. Patient-centered care or “Worst case scenario”? (7:19 min)
4. How can organizations build evidence-based health coaching teams? (3:36 min)
5. What are the guiding principles of motivational interviewing? (4:50 min)
6. What is the “Best case scenario” for patient-centered care? (4:56 min)

Presenters: Susan Butterworth, Ph.D. RN Associate Professor, Schools of Nursing and Medicine, Oregon Health Sciences University

Blake Andersen, Ph.D. President and CEO, Health Sciences Institute

II. Coaching patients for successful self-management

<www.chcf.org/publications/2008/08/video-on-coaching-patients-for-successful-selfmanagement/terms-of-use/watch-video-on-coaching-patients>

Online video: 14-minute video is available for streaming. Also available on DVD, free of charge.

Audience: Clinicians and other provider team members, MAs, health coaches

This video includes two topics: Using the Action Planning Process to support healthy behavior change and ensuring patients are taking their medications appropriately. Coaching techniques featured in this video encourage behavior change and medication adherence.

Highlighted techniques:

- Engage the patient.
- Help patient develop a realistic action plan.
- Assess patient understanding and agreement about medication use.
- Follow up to monitor progress.

Presenter: Tom Bodenheimer, M.D., University of California San Francisco and San Francisco General Hospital. Produced by The California HealthCare Foundation, an independent philanthropy committed to improving the way health care is delivered and financed in California.

III. Techniques for effective patient self-management

www.chcf.org/publications/2006/08/video-with-techniques-for-effective-patient-selfmanagement

Online video: 33-minute video is available for streaming. Also available on DVD, free of charge.

Audience: Health-care providers (PAs, MDs, NPs, RNs)

The presentation provides strategies and tools that busy clinicians can use to help patients adopt healthy behaviors. Demonstrated techniques are based on principles of motivational interviewing and provide a sampling of how to effectively support patients. While this may seem challenging at first, providers can implement the techniques step by step to begin engaging patients.

Highlighted techniques:

- Engage the patient to learn why behavior change might or might not be perceived as worthwhile from the patient's perspective.
- Explore and enhance the importance of making healthy behavior changes.
- Engage in collaborative action planning to support the patient's efforts in making a concrete, personally meaningful, and achievable plan for change.

Presenter: William H. Polanski, Ph.D., C.D.E., of the University of California, San Diego. Produced by The California HealthCare Foundation, an independent philanthropy committed to improving the way health care is delivered and financed in California.



