



Marquee Health Coach Program Manual – Member Engagement Protocols

Enrollment: Online Scheduler/Email

Member uses online scheduler or sends an email that they are interested in enrolling in a health coaching program.

Site Administrator receives email/notification and sends enrollment message to new member thanking them for interest in health coaching program, requests completion of Initial Health Assessment or Tobacco Questionnaire (if appropriate) OR requests program and method. Message includes notification that their health coach will reach out within 3 to 5 business days from enrollment.

Health coach receives new member assignment email sent by Site Administrator. Health Coach reviews information provided, Initial Health Assessment, or Tobacco Questionnaire if completed. If no IHA or Tobacco questionnaire is available, coach reviews notes provided at assignment. **Health Coach sends Welcome Email/First Session of program within 2 business days of receiving the assignment.**

Health coach creates Case for new member (or enrolls existing Case from “awaiting enrollment” if member already has a Case) in CoachSpect.

Health coach adds new member to Coaching Member Spreadsheet and saves on Sharepoint Daily.

Best Practices for engaging members: Email Coaching

- *Welcome Email/First Session* is sent within **2 business days** of assignment using the IHA and other information provided to build coaching relationship; includes Coach Bio and Maximizing the Coach Session document in PDF. *Or it is sent on the date/time requested if they used the online scheduler.*
- If member does not respond to Welcome Email, coach reaches out **again in 3-4 business days** to engage.
- Coach enters a Task to reach out at the appropriate time frame after sending any and all emails to member. There should always be an active Task for all coaching members (exception is CHC)

- Coach responds within 3 to 5 business days to messages from coaching members.
- Coach works collaboratively with member to design a plan using SMART Goals and Activities. SMART = specific, measurable, achievable, relevant, time-bound.
- Goal review (completion, extension, setting of new goal) takes place as appropriate (e.g every 4 weeks)
- If member becomes *inactive* (does not respond to coach emails) coach will continue to reach out bi-weekly to engage member for 12 total weeks.

**Total outreach when member stops responding (is inactive) = minimum of 5 emails from coach in 12 weeks (attempt to reach by phone as well at least 1 – 2 times). For a total of 6- 7 engagement attempts.*

Best Practices for engaging members: Telephonic/Video Coaching

Member calls/emails to enroll in health coaching program and requests Phone/Video communication or member uses online scheduler to request coaching via Phone/Video communication.

At intake (via phone or email) member will be informed that a health coach will reach out within 3 to 5 business days to complete first session or schedule first session.

At intake (if they used the online scheduler) an enrollment email is sent and confirms the topic/date/time they requested 1st phone/video coaching session.

Site Administrator assigns coaching member to coach.

- Tasks must be entered for every Case at the appropriate time frames
- Coach schedules first call/video session within 3 to 4 business days of assignment or at the preferred day/time indicated by member at enrollment if they used online scheduler.
- Coach sends an Email to introduce self – shares Coach Bio and Maximizing the Coach Session document in PDF with CONFIRMATION OF DATE/TIME WITH TIME ZONE OF SCHEDULED FIRST COACHING SESSION **within 2 business days of receiving assignment.**
- Coach schedules each follow-up call/video session at the frequency selected in collaboration with coaching member.
- **If member misses a scheduled phone call, coach leaves message asking for a return call and informs member they will try back in 5 minutes.** If no connection is made coach leaves message and informs member they will **call again at date/time selected by health coach (within 1 week if possible).** If no connection is made at the following outreach attempt, coach leaves message informing member they will call again in 1 or 2 weeks. **Coach follows up each Call (completed and missed) with an email via CoachSpect specifying the date/time of the next call. Coach carries out next call as scheduled.**
- **If member misses a scheduled video session after coach waits in Video Session for at least 10 minutes, coach follows up via email message within CoachSpect with the date/time/video link of next scheduled video session (within 1 week if possible). Coach carries out next video session as scheduled.**
- Coach continues attempting engagement via calls/videos and emails for a total of 12 weeks.

**Total outreach when member does not respond (is inactive) = minimum of 5 calls/video sessions from coach and 1 – 2 emails from CoachSpect from coach in 12 weeks. Total of 6 – 7 engagement attempts.*

Special Considerations:

If member enrolls in an RAS program (UBreathe, for example) coach should keep track of program dates and **plan outreach accordingly.**

If unsure, check in with Team Lead.

Follow-Up post completion of RAS/Points requirements

When a member successfully completes their RAS, Points earning program (etc), or My Rewards incentive program that is transmitting completions automatically, AND continued health coaching is available to them, coach will follow these next steps.

- *Email based coaching:* After they complete the last session that is required for RAS or Points earning, coach sends *additional* message informing member they have successfully completed the RAS/points requirements but have access to continuing health coaching if they are interested in continuing to participate. Coach shares a date for them to accept coaching (2 weeks later – SEE SAMPLE LANGUAGE BELOW). Coach closes Case with the date of the last completed session. If they accept, Coach Enrolls member in new program for continuing coaching. After enrolling in new program, coach sends first session of program.
 - *Sample language: Congratulations! Your response to Session #X satisfied the requirements of your xyz program (ie RAS, My Rewards, etc). You have access to unlimited health coaching and I am happy to continue to work with you if you would find it beneficial. Please let me know by “date” if you are interested in continuing to participate in health coaching. Would you please take a few minutes to share your feedback about your experience with me and with your health coaching program at this link (insert appropriate Exit Survey link). **Coach goes on to end the email with a personalized message. Coach will enroll the member with them again if and when the member replies to their message.***
- *Phone/video based coaching:* During phone/video session that completes requirements for RAS or points, coach informs member they have satisfied requirements and offers ongoing coaching. If member declines, coach closes Case. If member accepts, Coach closes Case with date of last session of RAS/points requirements and enrolls in new program for continued coaching. Coach sends the Exit Survey via Email to all at program completion (even if they reenroll in further coaching).
- If member is participating for My Rewards points and can earn points for multiple programs (including multiple tiles related to coaching in WR for e.g.) or if member is participating for RAS purposes and can also earn points for My Rewards or other points, Coach continues coaching with member (close Case as appropriate and re-enroll as appropriate). Coach reaches out at least 2 additional times after member stops responding before closing out for inactivity.

Health Coach Steps

1. Add new coaching member to Coaching Member Spreadsheet saved on sharepoint
2. Create/Enroll Case for new coaching member in CoachSpect.
3. Add Phone/Video/In-Person Coaching sessions as Task in CoachSpect and to Outlook Calendar (identify as phone/Video calls w/name of member and client) and add Task in Case (select send calendar invite within CS). CS will also send out the calendar invite and a reminder 24 hours in advance, if you select this – please do so if you have an email address for member.
4. Schedule phone coaching members **ASAP** after assignment, send email notification of appointment (if email is available) and call as scheduled.