

Step-by-Step Guide Checklist – Health Coach Intervention

- STEP 1:** Identify the key contact staff from your practice that will:
 - Implement the intervention
 - Implement CPT billing codes
 - Supervise health coaching staff
- STEP 2:** Meet with your Practice Facilitator to fill out Function & Form Matrix and MoA
- STEP 3:** Identify health coaching staff
 - If existing staff, modify their existing role and designate health coaching hours
 - If new staff, post job description, hire, and provide clinic orientation
- STEP 4:** Register your health coaching staff for Health Coach Training:
 - Sign up for the Motivational Interviewing Certification Program [here](#) (please fill out one form for each participant).
- STEP 5:** Meet with TN Heart Health Network Evaluation Team to:
 - Discuss and develop plan for Collection of Metrics
 - Discuss and develop plan to identify at-risk patients for health coaching
- STEP 6:** Train health coaching and office staff to use new CPT billing codes for selected health coaching services
- STEP 7:** Create process (policies and procedures) to identify at-risk patients for telephone outreach for provider referrals and warm hand-offs
- STEP 8:** Introduce health coaching intervention and staff to providers using Powerpoint Presentation for Overview of Health Coaching Intervention
- STEP 9:** Begin telephonic outreach, scheduling, health coaching, and documentation
- STEP 10:** Provide ongoing support for health coaches:
 - Supervisor for health coach meets with health coach on regular basis to check on processes and procedures
 - Health Coaching Lead on TN Heart Health Network Team mentors health coaching staff on both one-on-one and group conference call