Health Coaching and Wellness Planning During COVID-19 Tip Sheet

Individuals with chronic health conditions engage in self-management behaviors to maintain and improve their health, including diet, exercise, and sleep. Self-management of chronic conditions is particularly relevant to individuals dually eligible for Medicare and Medicaid, as 72 percent of this population have two or more chronic health conditions.[1] Health coaching and wellness planning programs have been shown to increase participants' self-management skills, as well as quality of life and achievement of health goals.[2] Health coaching and wellness planning are person-centered approaches that support individuals in developing the knowledge, skills, and confidence to manage their chronic conditions, learn healthy behaviors, and maintain overall wellness.[3] Typical roles of health coaches may include:

- Helping individuals prepare for appointments with clinicians, including planning questions or sharing concerns about their chronic conditions
- Ensuring participants understand guidance from their clinician(s)
- Assessing individuals' agreement with care plans
- Providing support in development and maintenance of healthy behaviors
- Improving comprehension of medication use and adherence
- Providing cultural support and guidance for health questions and concerns[4]

COVID-19 has impacted people with chronic conditions disproportionately. According to a March 2020 report from the Centers for Disease Control and Prevention (CDC), nearly 90 percent of adults hospitalized with COVID-19 had one or more pre-existing conditions.[5] It is important for health coaches to provide continued self-management support during the COVID-19 pandemic, whether directly related to COVID-19 or to people's chronic conditions. In fact, health coaches can reduce chronic disease burden and address social determinants of health during the COVID-19 pandemic.[6] The COVID-19 pandemic impacted delivery of health coaching and wellness planning, prompting health coaches to change from in-person to virtual meetings or trainings. In response to the COVID-19 pandemic,

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[1] Fox, M. & Reichard, A. (2013). Disability, health, and multiple chronic conditions among people eligible for both Medicare and Medicaid, 2005-2010. Atlanta (GA): *Preventing Chronic Disease* (US). Retrieved from: https://pubmed.ncbi.nlm.nih.gov/24050527/

[2] Klein, S. (n.d.). Case study: health plan-led coaching program leads to improved outcomes and cost savings. *The Commonwealth Fund.* Retrieved from https://www.commonwealthfund.org/publications/newsletter-article/case-study-health-plan-led-coaching-program-leads-improved-outcomes

[3] UCSF Center for Excellence in Primary Care. (2013). Health coaching. *The Regents of the University of California*. Retrieved from https://cepc.ucsf.edu/health-coaching.

[4] Ngo V., Hammer., H, Bodenheimer, T. (2010). Health coaching in the teamlet model: A case study. *Journal of General Internal Medicine*. 25(12):1375-1378. Retrieved from https://link.springer.com/article/10.1007%2Fs11606-010-1508-5.

[5] Garg, S., Kim, L., Whitaker M., O'Halloran, A., Cummings, C., Holstein, R., . . . & Fry, A. (2020). Hospitalization rates and characteristics of patients hospitalized with laboratory-confirmed coronavirus disease 2019 - COVID-NET, 14 States, March 1–30, 2020. *Morbidity and Mortality Weekly Report.* 69(15);458–464. DOI: https://www.cdc.gov/mmwr/volumes/69/wr/mm6915e3.htm

[6] Jordan, M. (2021). The Role of the health coach in a global pandemic. *Global Advances in Health and Medicine.* https://doi.org/10.1177/21649561211039456

Resources for Integrated Care developed this tip sheet with suggestions on how health plans and providers can incorporate health coaching and wellness planning during COVID-19.

Addressing COVID-19-Related Concerns

- **Ask about mental health**. Many individuals are experiencing mental health issues due to COVID-19, including fear, worry, and stress.[7] In addition to providing support for chronic conditions, health coaches can assist individuals who may be struggling with mental health difficulties. To best support individuals with mental health concerns, consider implementing the following tips:

  > *"Building rapport is even more important now that health coaching is being used in virtual settings and in response to a global pandemic. Remember core health coaching skills and meet people where they are within their goals."*
  > *– Patricia Mejia*

  - Incorporate Appreciative Inquiry in coaching conversations.[8] This approach shifts problem solving from focusing on weaknesses to focusing on what is working well and how to build on strengths. When applied to health coaching, the individual begins to build confidence, positive energy, and motivation around future possibilities. Appreciative Inquiry changes the conversation from deficit-based to abundance-based.
  - Utilize a group format if possible. Working with a peer group can provide additional encouragement and support for the individuals involved.[9] Being a part of a group promotes a sense of belonging and can empower individuals to make positive changes in their own lives.[10]

- **Take safety precautions when meeting in-person**. Individuals are beginning to resume in-person meetings. It is important to consider whether in-person meetings are necessary and take precautions if meeting in-person. Creating a safe and straightforward environment can help people feel comfortable interacting with health coaches. For example, providers may consider practicing physical distancing, refraining from physical contact (e.g., handshakes), and wearing face coverings.[11] Health officials also suggest refraining from meeting in person if someone is diagnosed with or experiencing symptoms of COVID-19, or has been in contact with anyone diagnosed with COVID-19.[12] Stressing the safety of in-person health coaching and giving clear messages about COVID-19 and precautions can help individuals feel comfortable engaging in-person. Be clear with what is known about COVID-19 and risk mitigation to reduce transmission of COVID-19. If an individual shares questions or concerns about meeting in-person, reference the most recent scientific information available through the CDC.

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[7] World Health Organization. (n.d.). Mental health and COVID-19. Retrieved from https://www.who.int/teams/mental-health-and-substance-use/mental-health-and-covid-19

[8] Ruhe, M., Bobiak, S., Litaker, D., Carter, C., Wu, L., Schroeder, C., . . . Stange, K. (2011). Appreciative inquiry for quality improvement in primary care practices. *Quality Management in Health Care*, 20(1), 37–48. https://doi.org/10.1097/QMH.0b013e31820311be

[9] Armstrong, C., Wolever, R., Manning, L., Elam, R., Moore, M., Frates, E., . . . Lawson, K. (2013). Group Health Coaching: Strengths, Challenges, and Next Steps. *Global Advances in Health and Medicine*, 95–102. https://doi.org/10.7453/gahmj.2013.019

[10] Ibid.

[11] Centers for Disease Control and Prevention. (2021). Guidance for large events and gatherings. Retrieved from https://www.cdc.gov/coronavirus/2019-ncov/prevent-getting-sick/prevention.html

[12] Ibid.

- **Address vaccine concerns**. The University of California, San Francisco (UCSF) Center for Excellence in Primary Care developed the [Hear, Express, Gratitude, Ask About Pros and Cons and Respond (HEAR)](#) technique to address vaccine hesitancy. The HEAR technique provides a guide for vaccine outreach workers to respectfully engage with individuals who are hesitant or strongly opposed to receiving the COVID-19 vaccine. This technique has been used in health coaching interactions for contact tracing efforts as well as in outreach to individuals who have not yet been vaccinated against COVID-19. Additional tips on addressing vaccine hesitancy are available on the [Resources for Integrated Care website](#).

Technology Access and Capacity

- **Assess individual technology resources and capabilities.** Some individuals may not have access to technology for health coaching or may not be familiar with how to use certain devices. If providing coaching virtually, understand each individual's current technology proficiency and what equipment is available to them. To meet technology needs of dually eligible individuals, the [Self-Management Resource Center at Stanford University](#) held small group workshops with three to five people through the telephone.

- **Connect with community-based organizations or local government to explore opportunities to connect individuals to technology.** The Center on Mental Health Services Research and Policy at the University of Illinois Chicago collaborated with the Illinois Department of Aging and Department of Health Services to identify and connect older adults and individuals with disability experiencing access challenges to tablets and internet connectivity.[13] They distributed tablets to older adults and individuals with disability who were disproportionally impacted by COVID-19 and included a flyer introducing health coaching services and instructions for signing up for the services.

- **Provide technical support to individuals before sessions.** Prepare individuals to participate in virtual coaching by contacting them before the session to walk through technical issues or connecting them with a technical support team if available. Encourage individuals to practice logging into the virtual platform. Provide a phone number for individuals to access technical support if their call drops during the meeting. In addition, keep technology features basic and do not use unnecessary features. The National Council on Aging offers useful [tools for reaching a remote audience](#), including tips and tricks for teaching via video and user guides for common applications such as Zoom, Skype, and Facebook Live.

Overcoming Virtual Barriers in Health Coaching and Wellness Planning

- **Establish and build rapport.** It can be challenging to connect with individuals virtually. Using a person's name, employing active listening, or using reflective listening helps build rapport. If speaking over the phone, it can be useful to smile while speaking to promote a friendly and positive tone of voice.

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[13] Dropka, M. (2021). State of Illinois distributes over 1,100 connectivity and assistive devices to keep older Illinoisans connected during COVID-19. *Illinois Department on Aging*. Retrieved from https://www2.illinois.gov/aging/Resources/NewsAndPublications/PressReleases/Pages/2021-0412.aspx.

- **Continue to use clinical strategies for health coaching**. Use motivational interviewing and Specific, Measurable, Attainable, Relevant, Time-bound (SMART) goal setting to support individuals' success. Creating achievable goals and expectations for care improve individuals' confidence in managing chronic conditions. Congratulate individuals for working on their goals, use positive reinforcement, and demonstrate respect.

- **Use evidence-based programs.** Evidence-based programs can be used in virtual or telephonic settings, as well as in-person settings. Research on evidence-based programs, including caregiver support, chronic pain, and mental health, is available on the Self-Management Resource Center at Stanford University's bibliography page.

  - Additional resources for finding evidence-based programs include the National Council on Aging (NCOA)'s evidence-based program tool or the Evidence-Based Leadership Collaborative's Recommended Programs page.

> *"Many people are taking measures to improve their health. Provide extra motivation for individuals to take medications now so they do not experience an interaction with a chronic condition if exposed to COVID-19."*
> *– Dr. Judith Cook, PhD*

Additional Resources

📄 National Council on Aging

The National Council on Aging's website shares resources, tools, best practices for health coaching and wellness planning. Notable resources include a COVID-19 and Health Promotion Frequently Asked Questions and Health Promotion Guidance During COVID-19.

👥 Health Coaching During COVID-19 Training Videos

The training videos available on the UCSF Center for Excellence in Primary Care's website include short videos on health coaching tools and their applicability to COVID-19 contact tracing. The videos cover setting an agenda, the Ask-Tell-Ask and Closing the Loop techniques, and addressing motivation, among other topics.

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