Health Coaches: Patient Selection and Effectiveness

Ellen Beckjord, PhD, MPH
Associate Vice President, Population Health and Clinical Transformation
UPMC Health Plan
What is Health Coaching?

Health coaching is the use of evidence-based skillful conversation, clinical interventions and strategies to support client/patients to achieve their health and wellness goals through lifestyle and behavior modification.

A health coach partners with individuals through the process of behavior change. This is done through support in setting goals, unearthing values, strengths, and motivations, and encouraging the development of sustainable healthy behaviors and attitudes.
“Health and Wellness Coaches partner with clients seeking self-directed, lasting changes, aligned with their values, which promote health and wellness and, thereby, enhance well-being.”

The National Consortium for Credentialing Health and Wellness Coaches (NCCHWC) (2019)
Responsibilities of a Coach

- Apply effective communication skills to help a client increase motivation and ownership to making a change.
- Help clients develop achievable and measurable goals to monitor success and motivate ongoing behavioral change.
- Help clients develop and exploit their strengths to support successful behavioral change.
Using Coaching Theory and Framework
Coaches Focus on Client Needs

- Motivation
- Commitment
- Accountability
- Feedback
- Self Awareness
- Self-Efficacy
- Reinforcement
- Knowledge
- Social Support
- Resource Awareness
- Self-Efficacy
Health Coach Academy by UPMC
Health Coach Training & Board Certification

• The National Board for Health and Wellness Coaching is a consensus-building collaboration of leaders representing many health and wellness coach training and education programs in the United States.

• Have worked diligently as to attain a vision of creating a National Certification for health and wellness coaches, built upon best practices.
Health Coach Academy by UPMC

1 of 9 health coach training programs approved by National Board for Health & Wellness Coaching

51 UPMC Health Plan lifestyle health coaches passed board certification to date
Health Coach Academy by UPMC

Health Coach Training & Skill Development

• Coaches are trained using a curriculum approved by the National Board for Health & Wellness Coaching (NBHWC). This includes 3-day Motivational Interviewing training, health coaching competencies, lifestyle knowledge, UPMC program delivery skills, practical skill evaluation (80 hour curriculum).

Quality Assurance Review (QAR) & Mentoring

• Coaches receive regular QAR and mentoring to support coaches in their use of the Motivational Interviewing and coach approach for engaging, activating, and supporting behavior change.

Skills Building/ Mentoring

• These bi-monthly sessions are a skills-based workshop focusing on a variety of topics and include lecture, demonstration, practice, and review of real member/clinician interactions.
Why Motivational Interviewing?

1. MI is the only health coaching approach that is standardized and associated with multiple published outcomes.

2. MI is the only health coaching approach supported by standardized & validated assessment tools.

3. Tools being used today to measure fidelity to MI approach in coaching.

4. Over 1400 clinical trials completed or in progress using MI.

5. There are 4 meta-analyses demonstrating efficacy of MI in health care.

6. MI has 4 phases which provide the clinician structure even in brief sessions:
   1. Engaging
   2. Focusing
   3. Evoking
   4. Planning

In one study, when MI best practices were compared with usual approach, enrollment was 4x greater.

35 Years MI has been applied and studied.

MI being taught around the world in over 52 languages.
Services
Health Coaching and Care Management

Services for Members

Clinical Navigation
- Triage
- Assessment
- Referral
- Prescription for Wellness
- New member clinical stratification

Lifestyle Coaching
- Weight Management*
- Nutrition Basics*
- Stress Management*
- Physical Activity*
- Tobacco Cessation*
- Healthy Families**
- Sleep**
- Diabetes**

Behavioral Health Coaching
- Anxiety*
- Depression*
- Substance Use
- Pain Management
- Grief
- ADHD

Behavioral Health Case Management
- Care Coordination
- Establishing treatment
- Complex Care Needs
- Follow up care
- General BH Case mgt

Physical Health Condition Management***
- Cardiac
- Respiratory
- Diabetes
- Rare and Chronic Disease
- Oncology
- Low Back Pain
- Shared Decision Making
- Kidney Health

Pediatrics
- Condition Management***
- Case Management
- NICU case management

Maternity***
- Prenatal
- Postnatal
- Interconception Care

Pharmacy
- Medication adherence
- Reconciliation
- Quality

*Digital available
**Digital in development
***Video sessions available
UPMC MyHealth Healthy Families

Family-centered coaching designed to empower parents to shape health of their families

UPMC MyHealth Healthy Families coaching program:

- Structured sequence of nine evidence-based workbook sessions
- Designed for parents/guardians of children 6-12 years of age

Guiding principles:

- Family-based intervention
  - Parent is coached in activities for the child.
- Flexible approach to fit needs
- Scalable intervention—one-on-one, self study, or in groups
- Knowledge and skill development
- Motivational interview coaching
RxWell is a digital program that combines in-app techniques with coaching support.

- RxWell offers seven programs: anxiety, depression, stress, weight management, nutrition, physical activity, and tobacco cessation.
- Patients learn skills and techniques to manage their needs.
- Digital health coaches provide individualized support and feedback.
- Data is secure, confidential, and never shared or sold.
- EpicCare users can order RxWell for their patients from the Digital Care tab.
Health coaching resources

Supporting patients to get engaged their way and time

The benefits for patients:

• No travel time.
• Flexible access options:
  • Telephone
  • Online
  • On-site
  • In-app
• Flexible coaching options:
  • 1-on-1
  • In groups (in progress)
• Convenient hours:
  • Monday through Friday from 7 a.m. to 8 p.m.
  • Saturday from 8 a.m. to 3 p.m.
• No out-of-pocket cost*

*UPMC Prescription for Wellness is not available to dental-only groups.
Results
UPMC MyHealth – Lifestyle Programs with Impact! (2010-2015)

- 65.2% Improved healthy eating
- 80% Lost Weight
- 78% Reduced stress
- 71% Increased physical activity
- 7% Quit rate
- 65.2% clinical success at 180 Days
- 44.2% clinical success at 180 Days
- 77.1% clinical success at 180 Days
- 50.5% clinical success at 180 Days
- 7.1% clinical success at 180 Days
### Weight Management

**March 1, 2021 - August 17, 2021**

<table>
<thead>
<tr>
<th>Enrolled in Weight Management Coaching</th>
</tr>
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<tbody>
<tr>
<td><strong># of Members who Took Assessment</strong></td>
</tr>
<tr>
<td><strong># of Assessments</strong></td>
</tr>
<tr>
<td><strong>Avg Weight Loss</strong></td>
</tr>
<tr>
<td><strong>Avg # of Sessions for Decreased Weight</strong></td>
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</table>

<table>
<thead>
<tr>
<th>Scale of 1-10 Rating</th>
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</thead>
<tbody>
<tr>
<td><strong>Members Enrolled</strong></td>
</tr>
<tr>
<td><strong>Sessions Completed</strong></td>
</tr>
<tr>
<td><strong>Alcohol/Week Change</strong></td>
</tr>
<tr>
<td><strong>Avg Sleep Change</strong></td>
</tr>
<tr>
<td><strong>Avg Health Score</strong></td>
</tr>
<tr>
<td><strong>Avg Social Support</strong></td>
</tr>
<tr>
<td><strong>Avg Conf. Change</strong></td>
</tr>
<tr>
<td><strong>Avg Int. Change</strong></td>
</tr>
<tr>
<td><strong>Avg Monitor Change</strong></td>
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</tbody>
</table>

#### Members Enrolled by Program

- **Weight Management**: 456
- **MyHealth Journey**: 44

#### Members Enrolled by Age Group

- **18 - 20**: 49
- **21 - 40**: 86
- **41 - 50**: 75
- **51 - 60**: 123
- **61 - 70**: 112
- **71 - 80**: 30
- **Over 80**: 4

### Enrolled in other Lifestyle Coaching (excluding weight management)

<p>| |</p>
<table>
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</table>
Physical Activity

March 1, 2021-August 17, 2021

Enrolled in Physical Activity Coaching

<table>
<thead>
<tr>
<th>59</th>
<th>4.79</th>
<th>2.86</th>
<th>80.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physical Activity Members Enrolled</td>
<td>Avg PA Habits Change</td>
<td>Avg PA Confidence Change</td>
<td>Avg PA/Wk Change</td>
</tr>
</tbody>
</table>

Improvements from pre to post on a 1-10 scale. Self ratings by members.

Improvement in physical activity for members participating in other lifestyle coaching

<table>
<thead>
<tr>
<th>1.16</th>
<th>1.31</th>
<th>39.33</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avg PA Habits Change</td>
<td>Avg PA Confidence Change</td>
<td>Avg PA/Wk Change</td>
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</tbody>
</table>

Scale of 1-10 Rating
Nutrition
March 1, 2021-August 17, 2021
Improvements from pre to post on a 1-10 scale. Self ratings by members.

<table>
<thead>
<tr>
<th>Number of Members</th>
<th>Habits Self Rating</th>
<th>Food Label Confidence</th>
<th>Change Confidence</th>
<th>Vegetable Change</th>
<th>Fruit Change</th>
<th>Fried Food Change</th>
<th>Sugary Drink Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>96</td>
<td>0.82</td>
<td>0.61</td>
<td>0.91</td>
<td>1.33</td>
<td>1.67</td>
<td>0.47</td>
<td>-0.43</td>
</tr>
</tbody>
</table>

Improvements in nutrition

<table>
<thead>
<tr>
<th># of Assessments</th>
<th>Avg Nutrition Self Rating Change</th>
<th>Avg # of Assessments for Improved Nutrition</th>
<th>Avg Sessions</th>
</tr>
</thead>
<tbody>
<tr>
<td>457</td>
<td>1.44</td>
<td>5.64</td>
<td>4.52</td>
</tr>
</tbody>
</table>

Avg Weight Loss Avg # of Sessions for Decreased Weight

-18.17 6.50

For members enrolled in the nutrition coaching program
Enrollments
8001

App Ratings
- App Store: 4.5 (70 ratings)
- Google Play: 3.7 (28 ratings)

App Downloads
- RxWell iOS: 9988
- RxWell Google Play: 4825
- Enrollment conversion: 53.8%

Provider Orders
- Xhealth Orders: 2528
- Orders to enrollment: 886
- Conversion rate: 35.0%

Health Improvement
40.5%
- Depression: 56.9%
- Anxiety: 53.4%
- Stress: 42.9%
- Healthy Eating: 0.0%

Engagement Funnel

Coach to Member Ratio
1 : 155

Patient Engagement
% of users completed at least 3 techniques: 65.4%
Complimenting and Extending Your Care
What is UPMC Prescription for Wellness?

An innovative physician-prescribed coaching program that connects patients to evidence-based health interventions and Board-Certified Health Coaches from UPMC Health Plan.

Available to all UPMC Health Plan members at **no cost.**

Physicians can enter orders directly through EpicCare or the Health Plan’s secure Provider OnLine Portal.

Modeled after best practice guiding principles:

- **Physician initiates** prescription for behavior change
- Use of EMR and technology integration for **streamlined notification**
- Link to Health Plan health coaches for **follow-up support**
- Leverage role of office staff for **reinforcement and updates**
- **Minimize patient barriers** (no cost, widely available, remote options and flexible hours)
UPMC Prescription for Wellness

Provider-prescribed, member support platform to access all Health Plan resources

- Behavioral Health Support
- Lifestyle Improvement
- Clinical Decision Support & Care Navigation
- Chronic Condition Management

Individual
Group
Telephonic
Chat
Face to Face
Telehealth
Asynchronous Digital
Prescription for Wellness Benefits ~ Improved Engagement and Patient Satisfaction

UPMC Health Plan’s “Impact of Physician Referral” Publication
Wins Paper of the Year Award from American Journal of Health Promotion

An outcomes study comparison of 8,000 physician-prescribed engagements vs 30,000 "usual care" health plan outreach intervention demonstrated a 300% increase in participation, enrollment and graduation from lifestyle programs (with significant risk shifts shown to be associated with better health and lower costs) when the physician prescribes coaching and engagement.

- Extends physician’s expertise and care management plan beyond the limited time of an in-office visit.
- Positions lifestyle medicine (treating the root cause of most chronic disease) as a primary part of treatment.
- Language in the patient’s printed order serves as a prescription for health and care support engagement which directs patient activation.
- Health coaches leverage the voice of the physician when engaging with patients as this reinforces both patient accountability and the working relationship between the physician and health coach.
- Improves patient engagement in healthy behaviors and self-management of chronic disease.
- Improves provider-patient relationship, which patients reflect in their assessments.

* Referrals from 7/1/14-12/31/2019
** Passive referrals for All LOB including incentivized from CY16
UPMC Prescription for Wellness

People, Process & Technology

Provider discusses with patient

Provider enters order

Same-day electronic notification

Health coach receives order information

Health coach engages/coaches patient

Health coach enters order results

Health coach note transmitted to provider

Patient updates provider via patient portal

Patient calls health coach*
Entering a Prescription for Wellness in EpicCare

- Order set incorporates GIM, CMI, HVI, and Women’s Health MD group recommendations, streamlines ordering, saves time/clicks and expands patient support options provided by UPMC Health Plan.

- Comprehensive and expanded menu of health plan resources to meet patient needs in pediatrics and family support, social determinants of health, and advanced care planning.
Entering a Prescription for Wellness in the Provider OnLine Portal

Provider OnLine Main Page

Welcome to UPMC Health Plan's Provider OnLine!

09/2020 - Provider OnLine Tutorial Videos Available
Please see our new Provider Online tutorial videos at the following link to learn more about how easy the UPMC Health Plan provider portal is to help you care for your patients.

View Provider OnLine Tutorial Videos

06/2020 - What you need to know about the Coronavirus

Prescription for Wellness Page

UPMC Prescription for Wellness Orders
Providers can place and review Prescription for Wellness Orders for UPMC Health Plan health coaching. Health coaching programs offer support for making a healthy lifestyle change, managing a health condition, and with shared decision making topics.

Place Referral

Review Notes

Order Print Materials

Provider Training & Rx
- How to make a Pres
- Wellness referral on
- UPMC
- UPMC's latest news of
- Prescription for Wellness
- UPMC Prescription for Wellness Guide
Entering a Prescription for Wellness in the Provider OnLine Portal

Please choose from the following referral topics for your patient:

- **Lifestyle**
  - Weight Management
  - Nutrition
  - Physical Activity
  - Tobacco Cessation
  - Stress Management

- **Cardiovascular Health**
  - Hypertension
  - Hyperlipidemia
  - Cardiovascular Conditions (CAD, ACS, MI)
  - CHF
  - COPD
  - End-Stage Renal Disease
  - Cancer

- **Respiratory Health**
  - Asthma

- **Other Physical Health Conditions**
  - Diabetes
  - Low Back Pain
  - CKD (Chronic Kidney Disease)
  - Hepatitis C
  - HIV

- **Rare and Chronic Conditions**
  - Seizure Disorder
  - Multiple Sclerosis (MS)
  - IBD

- **Behavioral Health Conditions**
  - Anxiety
  - Depression
  - Substance Abuse
  - Grief Support
  - Chronic Pain Management
  - ADHD

- **Shared Decision Making Support**
  - Preference Sensitive Surgeries (b) (hip, knee surgery, bariatric)
  - Cancer Treatment

- **Pediatrics**
  - Healthy Family Support
  - Asthma
  - Diabetes
  - Behavioral Health

- **Maternity**
  - Prenatal support/resources
  - Postpartum support/resources

- **Patient / Family Support Services**
  - Education
  - Food
  - Transportation
  - Housing

- **Special Concerns / Comments**

Users must select at least one item from available topics; however, they may select multiple items.

Users can also detail additional information regarding the referral and/or note another topic that is not listed.

[?] Back  [?] Cancel

[?] Continue
RxWell is a digital program that combines in-app techniques with coaching support.

- RxWell offers seven programs: anxiety, depression, stress, weight management, nutrition, physical activity, and tobacco cessation.
- Patients learn skills and techniques to manage their needs.
- Digital health coaches provide individualized support and feedback.
- Data is secure, confidential, and never shared or sold.
- EpicCare users can order RxWell for their patients from the Digital Care tab.
“Prescription Progress Note”

Returned in Approximately 30 Days

• Health Coaches outreach to patient within 48 hours of prescription.
  • Provider receives feedback in approximately 30 days of prescription
• Note back to practice from health coach will indicate one of following:
  • Reached
  • Unable to be Reached
  *Will include few sentences with more information on the outcome.
• Note back to the practice will include patient’s health coach name as well as their direct line.
  • Contact this health coach for questions regarding the specific patient

Goal: Continue to promote patient engagement, behavior change, and care adherence
Prescription for Wellness Provider Feedback Notes Now Accessible by Patient

- Health Coaches return feedback note on patient engagement and plan electronically to prescribing provider 30 days from date of prescription.

- Effective 3/31/21, feedback notes are visible to members via MyUPMC.
Physician and Office Team: Keys to Success

- Identify champions to spread the word
- Optimize the interdisciplinary team – *equip, empower, support.*
- Develop office systems and practice to support desired care
- Measure processes and outcomes – provide feedback to your team

It’s a team effort – from check-in to exit!
Every staff member plays a role
Provider/Office Staff Materials

UPMC Health Plan

UPMC Prescription for Wellness

Workflow to facilitate effective patient engagement: people, process, and technology

Provider/Office Staff Materials

UPMC Prescription for Wellness

Helping to create healthier, more engaged, and better informed patients using health coaching programs and services.

Pediatrics

Pediatric health management programs

- Available to help children and their families improve sail wellness and overall health
- Pediatric care management services
- Telephone outreach and ongoing follow-up
- Assessment of needs
- Education and support
- Referral to community resources and organizations
- Care coordination of care

Pediatric programs and services available through a Prescription for Wellness referral

- Action Health management
- Asthma Health management
- Diabetes Health management
- Medication management
- Care coordination of care

UPMC Health Plan

UPMC Prescription for Wellness

COVID-19 Resources

Writing a UPMC Prescription for Wellness can improve your patients’ health and care

Patients are up to 10 times more likely to use health coaching when you prescribe it!

UPMC Health Plan

UPMC Prescription for Wellness

Available health and wellness resources

LifeStyle Health

- Weight management
- Nutrition
- Blood glucose
- Physical activity
- Tobacco cessation
- Healthy eating

UPMC Health Plan

UPMC Prescription for Wellness

Deborah Snyder, DO

Family & Lifestyle Medicine
UPMC Community Medicine Inc.

In her own words:

I recommend Prenuvo for patients who have a medical condition like high blood pressure or high cholesterol. I explain that 80 percent of the work to control these conditions is done by the patients themselves. Once a month or once a week they call in, and I give them advice on how to eat and what to do to control their blood pressure. They are able to take their blood pressure at home, and when we see it coming up, we can change their delivery plan.
Patient Materials

Poster

Are you ready to live your healthiest life?

Brochures

To reach your health goals, you need a strong team—yes, your provider, and your health coach. UPMC Prescription for Wellness is an innovative program that lets your provider connect you with a UPMC Health Plan health coach, who will keep you motivated and on the path to success in your wellness goals.

Health coaches may be nurses, dietitians, social workers, exercise experts, or other trained clinicians. They’ll help address your specific concerns during phone sessions where you’ll work to create a plan tailored to your specific health needs. The best part? It’s all at no cost to UPMC Health Plan members.

Your health coach can help you:
- Manage conditions like diabetes, high blood pressure, and asthma.
- Make informed decisions about surgeries.
- Improve your family’s well-being and performance.

Don’t wait! Ask your provider for a Prescription for Wellness today!
Giveaways

Improve your patients’ health and care - Write a UPMC Prescription for Wellness today!
Prescription for Wellness Questions

Contact Information:

Jamie Delu – Director
Christine Sheffey – Program Manager
Christian Gabarda – Program Manager

Service Email Account: RxforWellness@upmc.edu
Prestigious award honors best health papers and those who bring outstanding humanity to fields of medicine

- Compared 8,000 physician-prescribed engagements vs 30,000 "usual care" health plan outreach intervention.
- 300% increase in participation, enrollment and graduation from lifestyle programs (with significant risk shifts shown to be associated with better health and lower costs) when the physician prescribes coaching and engagement.

**Impact of Physician Referral to Health Coaching on Patient Engagement and Health Risks: An Observational Study of UPMC’s Prescription for Wellness**

Michael D. Parkinson, MD¹, Tracy Hammonds, PhD², Donna J. Keyser, PhD, MBA³, Jennie R. Wheeler, MBA¹, and Pamela B. Peele, PhD²

Abstract

Purpose: Evaluate impact of physician referral to health coaching on patient engagement and health risk reduction.

Design: Four-year retrospective, observational cohort study with propensity-matched pair comparisons.


Sample: 10,457 adult insured members referred to health coaching by their physician; 37,864 other members identified for health coaching through insurer-initiated outreach.

Intervention: Practice-based, technology-supported workflow and process for physician prescribing of health coaching during regular office visit, with follow-up on patient’s progress and implementation supports.

Measures: Patient engagement based on completion of pre-enrollment assessment, formal enrollment in health coaching, completion of required sessions, health risk levels, and number of health risks pre- and post-health coaching referral.

Analysis: Difference-in-difference analysis to assess change in health risk levels and number of health risks pre- and post-health coaching and probability weighting to control for potential confounding between groups.

Results: Members referred by a physician were significantly more likely to enroll in a health coaching program (21.0% vs 6.0%, P < .001) and complete the program requirements (8.5% vs 2.7%, P < .001) than when referred by insurer-initiated outreach; significant within group improvement in health risk levels from baseline (P < .001) was observed for both the groups.

Conclusions: Patients are significantly more likely to engage in health coaching when a referral is made by a physician; engagement in health coaching significantly improves health risk levels.
Take Homes

- Optimize utilization of Prescription for Wellness in your clinic specialty/hospital
  - Verbalize prescription during visit and state expectation to be “filled” asap
  - Review your patient’s progress and reinforce health coach in feedback note
  - Contact the program office (Jamie Delu) for additional support onsite including presentation(s) to colleagues and office staff

- Utilize full spectrum of health plan support services for patients through Prescription for Wellness (EpicCare, Provider On-Line) and RXWell app (Xealth)
  - Healthy behaviors
  - Disease and case management
  - Shared decision-making support
  - Patient/family coaching and support
  - Advanced care planning and determinants of health

- Review practice- and provider-level reports and share how to improve with us!
Closing
There’s Something for Everyone in Health Coaching!

• UPMC Health Plan wants to support, compliment, and extend your care through our health coaching services!

• Send your patients who are our members our way and we will ensure they get the support they need to achieve the highest level of health and wellbeing available to them.

• We would love to connect with you to learn more about how health coaching can support your practice:
  • Dr. Ellen Beckjord, AVP, Population Health and Clinical Transformation (beckjorde@upmc.edu)
  • Tish Rohan, Director, Health Coaching Services (rohanlj@upmc.edu)
  • Jamie Delu, Director, Prescription for Wellness (williamsjl7@upmc.edu)
  • Dr. Amanda Gabarda, Senior Director, Clinical Training and Education (gabardaar@upmc.edu)

*With gratitude to this team who provided today’s content*