

First Appointment Checklist



Enter a cross (X) in the YES or NO column for each activity.

Participant ID: _____ Date: _____

Component	Appointment activity	YES	NO	N/A
Before the first appointment	Familiarised yourself with the intervention manual and resource packs			
	Arranged an appointment of approximately one hour with the older person			
	Telephone reminder to the older person that morning			
	Rearranged the appointment if the time was unsuitable			
Introduction	Audio recorder switched on and working			
	The purpose of HomeHealth was explained			
Learning about the person	Asked what is going well for the person			
	Discussed getting out and about			
	Discussed food and nutrition			
	Discussed socialising with others			
	Discussed the person's mood			
Focus on their outcome goal	The older person identified an outcome goal they wanted to work on			
	The goal was recorded in My Health and Wellbeing Plan			
Break down the goal into behavioural goals	Discussed what steps might help them to achieve this outcome goal			
	Identified a behavioural goal to work on			
Using COM-B	Discussed the person's capability of managing this step of behaviour			
	Discussed the person's motivation of managing this step of behaviour			
	Discussed the person's opportunities when managing this step of behaviour			
	Set a SMART goal with the person			
Form an action plan	An action plan was made as to how, where and with whom the target behaviour should be carried out			
	The person was signposted to appropriate services			
	The action plan was recorded in My Health and Wellbeing Plan			

Project worker – First appointment fidelity checklist

Encourage recording	How, when and where progress will be recorded was decided			
	How progress would be recorded was written in My Health and Wellbeing Plan			
Arrange next appointment	The person was asked if they were happy with the decisions made			
	The next appointment was arranged			
	Inter-appointment contact was arranged			
Organisation	Your copy of My Health Plan was filed in XXXX			
	Audio file and appointment checklist were uploaded to the data safe haven. ID and appt number were included in file name.			

Subsequent Appointments Checklist



Enter a cross (X) in the YES or NO column for each activity.

Participant ID:	Date:	Appointment Number:		
Component	Appointment activity	YES	NO	N/A
Before this appointment	Familiarised yourself with any relevant resource packs and the person's goals from the previous appointment			
	Telephone reminder to the older person that morning			
	Rearranged the appointment if the time was unsuitable			
Recording	Audio recorder switched on and working			
Review progress	Reviewed progress towards their goal			
	Gave positive feedback			
	Coping with setbacks was discussed			
	Discussed the next stage towards their overall aim, agreed a goal and recorded this in both copies of My Health and Wellbeing Plan			
	COM-B was used to identify current and future issues			
Form an action plan	An action plan was made as to how, where and with whom the target behaviour should be carried out			
	The action plan was recorded in both copies of My Health and Wellbeing Plan			
	The person was signposted to appropriate services			
	Ways to form habits were discussed and encouraged			
Encourage recording	How progress would be recorded was written in both copies of My Health and Wellbeing Plan			
Arrange next appointment	The person was asked if they were happy with the decisions made			
	The next appointment was arranged			
	Inter-appointment contact was arranged			
Organisation	Your copy of My Health Plan was filed in XXXX			
	Audio file and appointment checklist were uploaded to the data safe haven. ID and appt number were included in file name.			



Final Appointment Checklist

Enter a cross (X) in the YES or NO column for each activity.

Participant ID:		Date:	Appointment Number:		
Component Before this appointment	Appointment activity	YES	NO	N/A	
	Familiarised yourself with any relevant resource packs and the person's goals from the previous appointment				
	Telephone reminder to the older person that morning				
	Rearranged the appointment if the time was unsuitable				
Recording	Audio recorder switched on and working				
Review progress	Reviewed overall progress towards their goal				
	Gave positive feedback				
	Coping with setbacks was discussed				
	COM-B was used to identify current and future issues and explained how to use in the future				
Form a plan for the future	A plan was made as to where to turn to or what action to take if a relevant issue reoccurs or is ongoing				
	The plan was recorded in both copies of My Health and Wellbeing Plan				
	Ways to form habits were discussed and encouraged				
Closing the delivery of the intervention	The person was asked if they were happy with the decisions made				
	Summarised the steps they have taken and what they have achieved				
	Talked through strategies they can use to keep their motivation going after the visits stop				
	Made sure the person has been signposted to the appropriate services to ensure further follow up				
Organisation	Your copy of My Health Plan was filed in XXXX				
	Audio file and appointment checklist were uploaded to the data safe haven. ID and appt number were included in file name.				
	Content of HomeHealth service summary was discussed with the participant				
	Obtained verbal consent from the participant to share HomeHealth service summary with their GP				

First Appointment - Fidelity of delivery Checklist

Participant ID:

Date:

Component	Appointment activity	Completed	Completed to some extent	Not done	Not appropriate to be done	Unable to assess
Introduction	The purpose of HomeHealth was explained					
Learning about the person	Asked what is going well for the person					
	Discussed getting out and about					
	Discussed food and nutrition					
	Discussed socialising with others					
	Discussed the person's mood					
Focus on their outcome goal	The older person identified an outcome goal they wanted to work on					
	The goal was recorded in My Health and Wellbeing Plan					
Break down the goal into behavioural goals	Discussed what steps might help them to achieve this outcome goal					
	Identified a behavioural goal to work on					
Using COM-B	Discussed the person's capability of managing this step of behaviour					
	Discussed the person's motivation of managing this step of behaviour					
	Discussed the person's opportunities when managing this step of behaviour					

Researcher – First appointment fidelity checklist

	Set a SMART goal with the person					
Form an action plan	An action plan was made as to how, where and with whom the target behaviour should be carried out					
	The person was signposted to appropriate services					
	The action plan was recorded in My Health and Wellbeing Plan					
Encourage recording	How, when and where progress will be recorded was decided					
	How progress would be recorded was written in My Health and Wellbeing Plan					
Arrange next appointment	The person was asked if they were happy with the decisions made					
	The next appointment was arranged					
	Inter-appointment contact was arranged					
Overall impression (including communication skills, rapport, etc.)						
Further details						

Subsequent Appointments - Fidelity of delivery Checklist



Participant ID: _____ **Date:** _____ **Appointment Number:** _____

Component	Appointment activity	Completed	Completed to some extent	Not done	Not appropriate to be done	Unable to assess
Review progress	Reviewed progress towards their goal					
	Gave positive feedback					
	Coping with setbacks was discussed					
	Discussed the next stage towards their overall aim, agreed a goal and recorded this in both copies of My Health and Wellbeing Plan					
	COM-B was used to identify current and future issues					
Form an action plan	An action plan was made as to how, where and with whom the target behaviour should be carried out					
	The action plan was recorded in both copies of My Health and Wellbeing Plan					
	The person was signposted to appropriate services					

Researcher – Subsequent appointments fidelity checklist

	Ways to form habits were discussed and encouraged					
Encourage recording	How progress would be recorded was written in both copies of My Health and Wellbeing Plan					
Arrange next appointment	The person was asked if they were happy with the decisions made					
	The next appointment was arranged					
	Inter-appointment contact was arranged					
Overall impression (including communication skills, rapport, etc.)						
Further details						

Final Appointment – Fidelity of delivery Checklist



Participant ID: _____ **Date:** _____ **Appointment Number:** _____

Component	Appointment activity	Completed	Completed to some extent	Not done	Not appropriate to be done	Unable to assess
Review progress	Reviewed overall progress towards their goal					
	Gave positive feedback					
	Coping with setbacks was discussed					
	COM-B was used to identify current and future issues and explained how to use in the future					
Form a plan for the future	A plan was made as to where to turn to if a relevant issue reoccurs or is ongoing					
	The plan was recorded in both copies of My Health and Wellbeing Plan					
	Ways to form habits were discussed and encouraged					
Closing the delivery of the intervention	The person was asked if they were happy with the decisions made					

Researcher – Final appointment fidelity checklist

	Summarised the steps they have taken and what they have achieved					
	Talked through strategies they can use to keep their motivation going after the visits stop					
	Made sure the person has been signposted to the appropriate services to ensure further follow up					
Overall impression (including communication skills, rapport, etc.)						
Further details						