

Well-Being Assessment

Hello and Welcome to Wellcoaches!

Wellcoaches has created this well-being assessment to help you and your coach evaluate the effectiveness of your coaching program and your progress, before you start work with your coach, and if appropriate, 6 months and 12 months later.

Please note that Wellcoaches and your coach treat all of your personal information, including your name, your email address, your correspondence with us, and your personal Wellcoaches website, as private and confidential.

The completed assessment can be printed and/or saved by selecting **File > Save As >** and assigning a file name and location on your hard-drive.

MY AGREEMENT OF RELEASE OF LIABILITY

In consideration of my being allowed to receive coaching services from a certified wellness coach, and, in that process, to be coached in fitness, nutrition, weight management, stress management, mental health, and/or health risk management, I do hereby waive, release, and forever discharge my coach and Wellcoaches Corporation and its officers, agents, independent contractors, employees, representatives, executors, and all others from any and all responsibility or liability for injuries or damages resulting from my participation in any activities or my use of fitness equipment arising out of my participation in any activities under such coaching.

I do also hereby release all of those mentioned and any others acting upon their behalf from any responsibility or liability for any injury or damage to myself, including those caused by the negligent act or omission of any of those mentioned or others acting on their behalf or in any way arising out of or connected with my participation in any activities of wellness coaching.

I understand that as a part of my wellness coaching program, I may be coached to, or it may be suggested that I, participate in exercise activities, e.g., exercise, aerobic training, strength training, flexibility training, etc., that could be potentially hazardous. I also understand that such activities involve risks of injury and even death, and that I am voluntarily participating in these activities and using equipment and machinery with knowledge of the dangers involved. I hereby agree to expressly assume and accept any and all risks of injury or death.

I further understand that my certified wellness coach, as applicable, is an independent contractor and not an agent of Wellcoaches Corporation.

I do hereby further acknowledge that I have either had a physical examination and have been given a physician's permission to participate or that I have decided to participate in activity and or use of equipment and machinery without the approval of my physician and do hereby assume all responsibility and risks of injury or death from such participation and activity.

I accept the above agreement of release of liability and the terms of the well-being	assessment.
Date	
Client Name	
Signature	

WELL-BEING ASSESSMENT



Contact Information

*First Name				Se	×	F	Relationship	
First Name					Female	Single	Divorce	
*Last Name					Male	☐ Married		itted
*Birth Date		(mm/dd/y	ууу)			Separat	ed	
Children# and	ages							
Occupation								
Address								
City			State/Provir	nce		ZIP/Postal		
*Email					*Phone			
Select usernam	e/password for my se	cure coachir	g client web	site:				
*Username			*Password					
Indicate coach	name if you have alrea	ady selected	your coach:					
First		Last						
Indicate your c	oach's ID number if kr	nown:						
If you haven't s	elected your coach pl	ease indicat	e your prefer	ence				
	elected your wellness your preferred specia							
	for Coaching dress the following an	reas with my	coach (chec	k un to	five areas):			
Overall		cus with my	couch (check	it up to		l Emotional		
	orove well-being (health	n and happin	ess)			e work/life bala	nce	
	rove family well-being	. ааарр			-	ve sleep		
	rove energy				 ☐ Manag	e stress better o	r reduce stress	
☐ Imp	rove productivity				Reduce	e or quit smokin	g	
					Improv	e finances		
Dharica	1					e personal relat	•	
Physical	rease physical activity				☐ Manag	e drug or alcoho	ol issues	
	nage or prevent injury							
	e weight							
	e weight nage or maintain currer	nt weight			Spiritual			
	rove eating habits	ic vvcigitt			-	ve job satisfactio	n	
	prove eating habits prove health risks or me	dical condition	ons			e life satisfactio		
	luce need for medication) i i J			c inc satisfactio	••	

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*Sense of Purpose - I feel a strong sense of purpose	e in life:	*Joy -	l feel a dee	p satisfacti	on or joy in	my life:
*Gratitude - I feel grateful and appreciative for wha	at I have:	*Work	satisfacti	on - indicat	te level of sa	tisfaction:
ricer graterarana appreciative for wha			Julistacti	- marca	ie ievel of sa	usiaction.
*Personal relationship satisfaction - indicate level	l of satisfactio	n:				
My Readiness to Change						
My readiness to make changes or improvements	s in my life sa	tisfaction				
1. I am already maintaining good life satisfaction	n consistently	(6 mos. +)				
2. I recently started working on this						
3. I am planning a change this month						
4. I am planning a change to start in the next 6 n	months					
○ 5. I have no present interest in making a change	2					
My Importance						
Rate the importance to me of having a high level 1 - 10 (highest level)	l of life satisfa	action:				
1. Not important at all						
○ 2.						
○ 3.						
4 .						
○ 5. About as important as most of the other thing	gs I would like	to achieve	now			
○ 6.						
○ 7.						
○ 8.						
○ 9.						
10. Most important thing in my life now						
My Confidence						
My confidence level in my ability to reach and su 1 - 10 (highest level)	ıstain a high	level of life	satisfaction	on is		
-	<u> </u>	6.	○ 7.	○ 8.	O 9.	<u> </u>

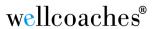
Energy



In a typical work-day what percentage of the time are you at (all three add up to 100% various levels of energy (physical and mental vigor or vitality):

Best: My energy is high, I am vigorous, and I an Average: My energy is good and I am able to a	•
Low: My energy is low and it's hard to accomp	olish what needs to get done
	<u> </u>
* 1. Best energy	
* 2. Average energy	
* 3. Low energy	
When you are not working what percentage of the time	e are you at (all three add up to 100%)
* 1. Best energy	
* 2. Average energy	
* 3. Low energy	
3. Low chergy	
Energy drains - Select the top three things that drain your energy.	Energy boosters - Select the top three things that boost your energy.
a. Poor or insufficient sleep	a. Healthy sleep
b. Too little exercise	b. Regular exercise
c. Unhealthy eating habits	c. Healthy eating habits
d. Stress	d. Stress management, relaxation, or fun activities
e. Weight management issues	e. Healthy mindset
f. Physical health issues	f. Healthy family and personal relationships
g. Pessimism or emotional issues	g. Healthy work relationships
h. Work issues	h. Maintaining healthy weight
i. Family or relationship issues	i. Maintaining good physical health
j. Financial issues	j. Job satisfaction
k. Other - describe	k. Spiritual activities
	☐ I. Healthy finances
	m. Other - describe

Energy



1 - 10 (highest level)						
1. Not important at all						
○ 2.						
○ 3.						
○ 4.						
○ 5. About as important as most of the other things I would like to achieve now						
<u>○</u> 6.						
○ 7.						
○ 8.						
○ 9.						
10. Most important thing in my life now						
My Readiness to Change						
My readiness to make changes or improvements in my energy levels:						
1. I am already maintaining good energy levels consistently (6 mos. +)						
2. I recently started working on this						
3. I am planning a change this month						
4. I am planning a change to start in the next 6 months						
○ 5. I have no present interest in making a change						
My Confidence My confidence level in my ability to reach and sustain my best energy levels at least 50% of the time is: 1 - 10 (highest level)						
1. 2. 3. 4. 5. 6. 7. 8.	○ 9.					

Weight

wellcoaches®

Body Mass Index

*Height in inches (without shoes)	
*Waist Measurement in inches:	Describe any weight-management program pursued in the last 10 years:
*Current weight in pounds (without shoes)	
Weight in pounds one year ago	
Weight in pounds two years ago	
Weight in pounds five years ago	
Weight in pounds ten years ago	
My Importance Rate the importance to me of reaching and sustaining a land 1 - 10 (highest level)	healthy weight:
1. Not important at all	
○ 2.	
○ 3.	
4.	
○ 5. About as important as most of the other things I would	d like to achieve now
○ 6.	
○ 7.	
○ 8.	
○ 9.	
10. Most important thing in my life now	
My Readiness to Change My readiness to make changes or improvements to read	h and sustain a healthy weight
1. I am already maintaining a healthy weight (6 mos. +)	in and sustain a nearthy weight
2. I recently started working on this	
3. I am planning a change this month	
4. I am planning a change to start in the next 6 months	
5. I have no present interest in making a change	
My Confidence My confidence level in my ability to reach and sustain a 1 - 10 (highest level)	a healthy weight:
○ 1. ○ 2. ○ 3. ○ 4. ○ 5.	○ 6. ○ 7. ○ 8. ○ 9. ○ 10.

Exercise



Regular physical activity - Do you currently participate in regular physical activity?

* Regular physical activity is defined as:

A. At least 20 minutes of vigorous activity 3 or more days per week (hard enough to make you breath heavily or make your heart beat faster) or

B. At least 30 minutes of moderate intensity activity 5 or more days per week. *Other physical activity minutes - How many minutes in an average day are you physically active (gardening, physical labor, use stairs not elevator, walk not drive, etc): Current limitations on physical activity (e.g. injuries, illness, medical conditions): Previous limitations on physical activity (over the last 5 years): *Aerobic exercise - How many days per week do you engage in aerobic exercise of at least 20 minutes duration (fitness walking, cycling, jogging, swimming, aerobic dance, active sports)? *Strength exercises - How many times per week do you do strength building exercises for ten minutes or more, such as sit-ups, pushups, or use strength training equipment? *Flexibility or stretching exercises - How many times per week do you do stretching exercises for five minutes or more to improve flexibility of your back, neck, shoulders, and legs?

Exercise



Rate the importance to 1 - 10 (highest level)	me of reg	ular physica	l activity:					
1. Not important at a	ıll							
○ 2.								
○ 3.								
○ 4.								
○ 5. About as importar	nt as most o	of the other th	ings I would	l like to achie	ve now			
○ 6.								
○ 7.								
○ 8.								
○ 9.								
10. Most important t	hing in my l	ife now						
My Readiness to Ch	_	•						
My readiness to make o	nanges or	ımprovemei	nts to reacn	or sustain re	eguiar pnysic	aı activity:		
1. I am already maint	aining good	d energy leve	ls consistent	ly (6 mos. +)				
2. I recently started w	orking on t	his						
3. I am planning a ch	ange this m	nonth						
4. I am planning a ch	ange to star	t in the next	6 months					
○ 5. I have no present i	○ 5. I have no present interest in making a change							
My Confidence My confidence level i 1 - 10 (highest level)	n my ability	y to reach an	d sustain re	gular physic	al activity:			
<u> </u>	3.	_ 4.	<u></u>	○ 6.	○ 7.	○ 8.	○ 9.	<u> </u>

Nutrition

Breakfast and Snacks

*Breakfast - How often do you eat breakfast, more than just a roll and a cup of coffee?
a. Eat breakfast every day
○ b. Eat breakfast most mornings
c. Eat breakfast two to three times per week
d. Seldom or never eat breakfast
*Snacks - How often do you eat "junk" snack foods bewteen meals (e.g. chips, pastries, candy, ice cream, cookies)
a. Three or more times per day
○ b. Once or twice per day
○ c. Few times per week
○ d. Seldom or never eat "junk" snack foods
Fats
*Fat intake - Indicate the kinds of food you usually eat
A. High fat examples: hamburgers, hot dogs, bologna, steaks, sour cream, cheese, whole milk, eggs, butter, cake, pastry, ice cream, chocolate, fried foods, and many fast foods B. Low fat examples: lean meats, skinless poultry, fish, skim milk, low fat dairy products, fruit desserts,
vegetables, pasta, legumes (peas and beans)
1. Nearly always eat the high fat foods
2. Eat mostly the high fat food, some low fat
3. Eat both about the same
 4. Eat mostly low fat foods, some high fat
○ 5. Eat only low fat foods
*Trans fats - are commonly listed as "partially hydrogenated vegetable oil" on food labels. These processed fats increase your risk of developing heart disease. Many snacks, baked goods, and even healthy-appearing breakfast cereals contain trans fat or partially hydrogenated vegetable oil. How often do you eat foods containing trans fats or partially hydrogenated oil?
○ a. Many times each day
○ b. At least once a day
○ c. Occasionally
○ d. Rarely, if ever
\bigcirc e. I haven't paid attention to trans fats or partially hydrogenated vegetable oils before



Breads, Grains, Fruits, Vegetables

	*Breads and grains - Indicate the kinds of breads a	d grains you usually eat					
	A. Refined grain examples: white bread, rolls, regula cereals, typical baked goods	pancakes and waffles, white rice, typical breakfast					
	B. Whole grain examples: whole grain breads, brown	rice, oatmeal, whole grain or high fiber cereals					
	1. Nearly always eat refined grain products	4. Eat primarily whole grain products					
	2. Eat mostly refined grain products	5. Eat only whole grain products					
	3. Eat both about the same	6. I have gluten intolerance or allergies to certai	in grains				
	*Fruits and vegetables - How many servings of fru cup fresh, 1/2 cup cooked, 1 medium size fruit, or 3/						
	1. one or less 2. two daily 3. t	ree daily	ore				
Flu	ids						
	*Water intake - How many eight ounce glasses of water do you drink on average per day?	*Number of drinks - How many alcoholic you usually have per weekday (one ounce ounces beer, or 4 ounces of wine)?					
	a. None	○ a. 6 - 8 glasses					
	○ b. 1 -2 glasses	○ b. 3 - 5 glasses	○ b. 3 - 5 glasses				
	C. 3 - 5 glasses	○ c. 1 - 2 glasses					
	○ d. 6 - 8 glasses	od. Seldom or never					
	*Soft drink intake - How many eight ounce glasses non-diet soft drinksdo you drink on average per day	· · · · · · · · · · · · · · · · · · ·					
	○ a. 6 - 8 glasses	a. 6 - 8 glasses					
	○ b. 3 - 5 glasses	○ b. 3 - 5 glasses					
	C. 1 - 2 glasses	○ c. 1 - 2 glasses					
	○ d. Seldom or never	od. Seldom or never					

Nutrition



1 - 10 (highest level)	to me or com	summy near	tily lood all	u uriiiks iiios	st of the time	:.		
1. Not important a	t all							
○ 2.								
○ 3.								
5. About as import	ant as most of	f the other th	ings I would	like to achiev	e now			
○ 6.								
○ 7.								
○ 8.								
○ 9.								
10. Most important	thing in my li	ife now						
My Readiness to My readiness to mak	e changes or				food and dri	nks:		
1. I am already mai			ls consistent	ly (6 mos. +)				
2. I recently started	_							
3. I am planning a	_							
4. I am planning a	_							
5. I have no preser	t interest in m	naking a chan	ge					
My Confidence My confidence leve 1 - 10 (highest leve		y to consum	e healthy fo	od and drinl	cs most of th	e time:		
○ 1. ○ 2.	3.	_ 4.	<u></u>	○ 6.	7.	○ 8.	○ 9.	<u> </u>

Health

General Health	What is your blood pressure: My numbers Don't Know					
*Complete the following statement. In general, my overall health is	Systolic (high number)					
1. Poor	Diastolic (low number)					
2. Fair	What is your total cholesterol:					
○ 3. Good	What is your LIDI (good shelestors)					
○ 4. Very good	What is your HDL (good cholesterol)					
○ 5. Excellent	What is your LDL (bad cholesterol)					
	What is your fasting Triglyceride level					
	What is your fasting glucose level					
*Physician relationship. Do you have a primary care doctor who you trust and see regularly?	*Physical Exam. When was your last physical examination? Within the last					
○ 1. No	a. Five or more years					
2. Somewhat	○ b. 3 - 4 years					
○ 3. Yes	○ c. 2 years					
	○ d. Year					
Health Issues						
Women's health issues - Mark all that apply. Men skip to next question.	Men's health issues - Mark all that apply. Women skip to next question.					
Currently pregnant.	Had prostate exam within last 12 months					
Had PAP smear within last 13 months	Practice monthly testicle self exam for lumps					
Had mammogram within last 12 months						
Practice monthly breast self exam	Sick days - How many days did you miss from work due to illness or injury during the last 6 months?					
Medications - How often do you use drugs or	Tobacco status - Mark the appropriate response:					
medicines (include prescription and nonprescription) that treat depression, affect your	a. Use chewing tobacco regularly					
mood, help you relax, or help you sleep?	 b. Currently smoke ten or more cigarettes daily 					
a. Frequently	c. Currently smoke less than ten cigarettes daily					
b. Sometimes	d. Smoke pipe or cigar only					
C. Rarely	e. Quit smoking less than two years ago					
○ d. Never	f. Quit smoking two or more years ago					
	g. Have never smoked (or used tobacco)					

Family Health History

Family health history	Mark any of the following health problems found
in your family (parent, b	rother, sister).

1. Colorectal cancer
2. Breast Cancer
3. Depression
4. Diabetes
5. Coronary heart disease, heart attack, or coronary surgery before age 55 in men, before age 65 in women
6. High blood pressure
7. High blood cholesterol
8. Suicide
9. None

Personal Health History

Has a doctor informed you that you currently have any of the following health problems? If yes, mark either "Yes and is not under control" or "yes and taking medication or is under control", otherwise please select N/A

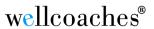
	Yes and is not under control	Yes and taking medication or is under control	N/A
Asthma or lung disorder	0	0	0
Bowel polyps or inflammatory bowel disease	0	0	\circ
Cancer, other than non-melanoma skin cancer	O	0	0
Chronic bronchitis or emphysema (COPD)	0	0	\circ
Coronary heart disease, congestive heart failure, angi heart attack or heart surgery	na,	O	0
Depression (mental illness)	0	0	0
Diabetes (high blood sugar)	0	O	0
High blood pressure (140/90 or higher)	0	0	\circ
High blood cholesterol (200 or higher)	0	0	0
Sciatica or chronic back problem (musculoskeletal)	0	0	0
Stroke or restricted blood flow to head or legs	O	0	0
Arthritis	0	0	0

 ${\color{red}\text{Health}} \\ \text{well coaches}^{\text{\tiny{\$}}}$

Current Symptoms

Mark any of the following symptoms you have experienced within the last four weeks.
a. Chest pain or discomfort, frequent palpitations or fluttering in the heart
b. Unusual shortness of breath
c. Unexplained dizziness or fainting
d. Temporary sensation of numbness or tingling, paralysis, vision problem, or lightheadedness
e. Frequent urination and unusual thirst
f. Frequent back pain
g. Have trouble sleeping lately
h. None
Bodily Pain
How much bodily pain have you had during the past four weeks.
1. Very severe
2. Severe
3. Moderate
4. Mild
5. Very mild
6. None
Health Limitations
During the past four weeks, how much difficulty did you have doing your work or other regular activities as a result of your physical health.
a. Could not do daily work
b. Quite a bit
c. Some
d. A little bit
e. None

Health



Rate the im 1 - 10 (high		to me of mai	naging my h	ealth:					
1. Not in	nportant at	all							
○ 2.									
○ 3.									
<u> </u>									
5. Abou	t as importa	ant as most o	f the other th	ings I would	like to achiev	e now			
○ 6.									
○ 7.									
○ 8.									
○ 9.									
○ 10. Most	important	thing in my l	ife now						
My Readi		_	improveme	nts in mana	ging my heal	th			
	lready mai	ntaining goo	d energy leve	ls consistent	ly (6 mos. +)				
2. I recei	ntly started	working on t	this						
	olanning a	change this n	nonth						
	lanning a d	hange to sta	rt in the next	6 months					
○ 5. I have	no presen	t interest in m	naking a chan	ige					
•			anges or imp	provements	in managing	my health:			
O 1.	○ 2.	○ 3.	4.	○ 5.	○ 6.	○ 7.	○ 8.	○ 9.	<u> </u>

Coping, Sleep, Stress and Emotional Issues

*Coping. How well do you feel you are coping with your current stress load?	*Sleep. How many hours of sleep do you get on average?				
a. Feeling unable to cope any more	a. Less than 6				
○ b. Often have trouble coping	○ b. 6 - 7				
c. Have trouble coping at times	○ c. 7 - 8				
d. Coping fairly well	○ d. 8 - 9 or more				
e. Coping very well					
*Stress - Mark any symptoms below that apply to you.	*Emotional issues - During the past four weeks, to what extent have you				
1. Minor problems throw me for a loop.	accomplished less than you would like				
2. I find it difficult to get along with people I used to enjoy.	your work or other daily activities as a result of emotional issues, such as feeling depressed or anxious				
3. Nothing seems to give me pleasure anymore	1. Extremely				
4. I am unable to stop thinking about my problems.	2. Quite a bit				
5. I feel frustrated, impatient, or angry much of the time.	3. Moderately				
6. I feel tense or anxious much of the time.	4. Slightly				
7. None of the above	5. None at all				
Social Activity - During the past four weeks, to what extent has you interfered with your normal social activities with family, friends, neighbor. 1. Extremely	• •				
2. Quite a bit					
3. Moderately					
○ 4. Slightly					
○ 5. None at all					
Personal loss - Have you suffered a personal loss or misfortune in the disability, divorce, separation, or the death of someone close to you					
○ a. No					
○ b. Yes - one loss					
c. Yes - two or more serious losses					
Social support - Do you have friends/family with whom you can sha	are problems/get help if needed?				
a. No					
○ b. Yes					

Feelings

- * The next questions are about how you feel things have been with you during the past four weeks. For each question, please give the one answer that comes the closest to the way you have been feeling. How much of the time during the past four weeks ...
 - 1. None of the time
 - 2. A little of the time
 - 3. Some of the time
 - 4. A good bit of the time
 - 5. All of the time

	1	2	3	4	5
a. Have you felt calm and peaceful?	\bigcirc	\circ	0	\circ	\circ
b. Did you have a lot of energy?	\bigcirc	0	\circ	\circ	\circ
c. Have you been a happy person?	0	0	0	0	\circ
d. did you take the time to relax and have fun daily?	\circ	\circ	\circ	\circ	\circ
e. Have you felt downhearted or blue? (If you answer 3 or higher, please complete the depression evaluation)	O	0	0	0	C
f. Have you felt worthless, inadequate, or unimportant?	\circ	\circ	\circ	\circ	\circ

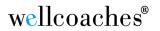
(If you answer 3 or higher, please complete the depression evaluation)

Depression Evaluation

If you answered 3 or higher for the previous section "Feelings e. and f.", please complete the following:

- A. None or little of the time.
- B. Some of the time.
- C. Most of the time.
- D. All of the time.

	Α	В	C	D
Been feeling low in energy, slowed down?	0	\circ	\circ	\circ
Been blaming yourself for things?	\bigcirc	\circ	\circ	\bigcirc
Had a poor appetite?	0	\circ	0	\circ
Had difficulty falling asleep, staying asleep?	\bigcirc	\circ	\circ	\circ
Been feeling hopeless about the future?	0	\circ	0	\circ
Been feeling blue?	\bigcirc	\circ	\circ	\bigcirc
Been feeling no interest in things?	0	\circ	0	\circ
Had feelings of worthlessness?	\circ	\circ	\circ	\circ
Thought about or wanted to commit suicide?	0	\circ	0	\circ
Had difficulty concentrating or making decisions?	0	0	\circ	\circ



My Importance

and emotions well and maintaining a positive mindset): 1 - 10 (highest level)
1. Not important at all
○ 2.
○ 3.
○ 5. About as important as most of the other things I would like to achieve now
○ 6.
○ 7.
○ 8.
○ 9.
10. Most important thing in my life now
My Readiness to Change
My readiness to onange My readiness to make changes or improvements to reach and sustain optimal mental and emotional fitness is:
1. I am already maintaining good energy levels consistently (6 mos. +)
2. I recently started working on this
3. I am planning a change this month
4. I am planning a change to start in the next 6 months
○ 5. I have no present interest in making a change
My Confidence
My confidence level in my ability to reach and sustain optimal mental and emotional fitness (managing stress and emotions well and maintaining a positive mindset):
1 - 10 (highest level)
1. 2. 3. 4. 5. 6. 7. 8. 9. 10.

Rate the importance to me of reaching and sustaining optimal mental and emotional fitness (managing stress



Thank you for completing this Well-Being Assessment.

If you wish to print a copy of this assessment simply click on the Print Form button at the bottom of this page.

Comments or suggestions are invited and welcome. Please email clients@wellcoaches.com.

Our best,

The Wellcoaches Team