**Cost and Quality Conversation
WORKFLOW GUIDANCE**

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| **Timing** | **Workflow Goal** | **Workflow Role** |
| Pre-Visit Planning/Team Huddle | 1. Identify patients who may benefit from the conversation
2. Communicate approach and flag chart
 | **Chart Prep:*** Inform if any orders/referrals were not completed and why

**Full Staff:*** Identify and flag charts that need to have cost and quality options discussed with the patient
* Determine if a next step in testing will be needed and have options ready for the patient visit
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| Check-In | 1. Let patients know the conversation is welcomed – you are the first step!
2. Identify patients who could benefit from cost conversations
 | **Front Desk:*** Provide wallet cards
* Collect Insurance Information with Deductible
* Provide screening questionnaire
* Communicate/flag changes in insurance type, insurance status, deductible amounts or employment status
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| Rooming/Triage | 1. Let patients know the conversation is welcomed
2. Alert the provider of any concerns from huddle/screening/rooming
3. Improve patient health literacy
 | **MA/Nurse:*** Ask about medication adherence
* Ask about any missed tests
* Provide health literacy information. Confirm they have the wallet card.
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| Visit | 1. Let patients know the conversation is welcomed
2. Empower the patient with options for their healthcare that include cost and quality information.
3. Improve patient health literacy
 | **Clinician:*** Follow up on flagged charts (adherence concerns, insurance changes, employment status changes)
* Document goals/barriers that relate to cost
* Provide treatment options with benefits and trade-offs (including cost/quality)
* Alert appropriate person if any follow up is needed to answer questions
* Provide the patient a direction to find answers that you may not have.
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| Check Out | 1. Let patients know the conversation is welcomed
2. Provide the patient with next-step guidance for orders/referrals
3. Assist them in getting answers to follow up questions related to cost and/or quality.
 | **Check out/front desk staff:*** Provide list of recommended facilities for the lab/test/imaging they are getting
* Provide list of specialists for their referral options
* Reiterate the need to check with insurance for which facilities or clinicians are in-network
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| After-visit care | 1. Continue to let the patient know the conversation is welcomed
2. Identify adherence barriers related to cost
3. Provide next step guidance for cost concerns
 | **Care Coordinator/Financial Counselor:*** Review the care that they need
* Identify why they haven’t received care
* Answer questions and provide them with tools/resources
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