**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 |
| 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 |
| 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. |
| 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. |
| 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 |
| 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 |