Cost and Quality Conversation
WORKFLOW GUIDANCE

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