

## Step 1. Establish the What and Why

### Practice Assessment

1. Do you currently assess for health care cost differences?
  - a. Yes. How do you currently assess for it? Who does it? When? How are the findings communicated to the clinician?
  - b. No. How do patients currently communicate health care cost differences? How does the clinician discover that a patient may be experiencing health care cost differences?
2. Once health care cost differences are identified, how is that communicated to the clinician?
3. How does the health care team come up with a plan to address the cost differences? Who does it?
4. How are the care plan and plan documented in the electronic health record?
5. Who follows up with the patient about this and when?

### Patient Flow Evaluation

1. Sketch out all of the steps of a patient visit at your clinic. Start with registration and making an appointment prior to physically coming to the clinic, then sketch each step after the patient arrives.
2. List everything that occurs for each step. Who does the patient talk to? What questions are the patient asked?
3. Identify a few where a patient is encouraged to determine which equipment they need. For example, who encourages the patient for immunization and when? How is that communicated to the clinician? What other encouraging areas are routinely done, and by whom?

## Step 2: Measuring Change

1. Identify potential measures of success (number of patients screened for cost differences, number of cost conversations, patient satisfaction with cost conversation, clinician team satisfaction with process/conversation).
2. Develop a data collection plan that is not too onerous.
3. Write an AIM statement detailing the outcome you would like to see that is measurable and time specific.



## Step 4: Implement and Sustain Your Plan

1. Put your plan into action.
2. Periodically review your results and make changes to the plan as needed. For example, you initially thought it would work best for the medical assistant to screen, but now you realize it makes more sense for a nurse to screen following the patient's visit with the clinician.
3. Continue implementing and measuring your progress, making changes as needed to reach your cost-saving and cost-containment goals.