

Financial Strain Team Assessment



Date: _____

Team Name: _____

The Tool

This team assessment shows a range of behaviours that align with the Reducing the Impact of Financial Strain (RIFS) high impact changes and potentially better practices.

As a practice facilitator, we encourage you to use this tool early in your improvement team meetings to generate meaningful discussion. This tool may help the team recognize areas where the team already has strengths and potential areas for improvement. You may also uncover some differences of opinion among team members. The tool can be facilitated in a group, asking the team to collectively come up with a rating.

Directions:

Ask the team to come to a consensus to circle a number (on a 1-5 scale) that most closely represents the current state. On the left hand side are statements that might closely reflect current common behaviors in practice and on the right hand side are statements that may reflect a practice team's desired behavior. How to use the 1-5 scale:

- 1 = statement to the left most accurately reflects our clinic's current state
- 2 = we are closer to the left statement but making progress to move towards the right
- 3 = we have made considerable progress in this area, but still have a ways to go before we are at the desired state
- 4 = we are closer to the right statement but aren't reliably at the desired state
- 5 = statement to the right most accurately reflects our clinic's current state

It may be difficult to assign a rating; you may want to use an average of team member responses.

We suggest using this assessment at the start of your process improvement efforts in order to identify strengths and opportunities for improvement. It may be helpful to repeat this activity again at six months to assess your progress.

Questions the practice facilitator may want to consider to engage the team in discussion:

- What is the range of responses across team members? Do you arrive at consensus easily? What factors influenced this range of responses? How did team members in different roles differ in their responses?
- What were some of the highest scoring statements? What were some of the lower scoring statements?
- Where might you begin your improvement efforts?

Improve the patient experience

Current state	Future state
Physicians on our team are solely responsible caring for patients experiencing financial strain.	We have an established improvement team for supporting patients experiencing financial strain that includes a patient representative.
1	2 3 4 5
Our team makes care decisions based on our understanding of the most important medical needs.	Our team collaborates with the patient to develop a shared care plan that includes the patient's most important needs and what matters to him/her.
1	2 3 4 5
Patients are reluctant to share information about their financial circumstances with the team.	Patients proactively bring up financial concerns that are affecting their health without the worry of feeling shame or that they are being judged.
1	2 3 4 5
Patients have a challenging time booking an appointment to see their family physician.	Patients can have timely access to see their team and if an appointment is missed the patient receives a follow up phone call to discuss why they weren't able to attend clinic appointment.
1	2 3 4 5

Identify paneled patients

Current state	Future state
The team not able to identify patients experiencing financial strain in the EMR.	The team reviews the EMR list of patients identified with financial strain on a planned and regular basis.
1	2 3 4 5
No established processes for identifying patients experiencing financial strain.	Criteria established based on population risk factors where at any type of appointment patients are assessed using a standardize question(s) to assess for financial strain.
1	2 3 4 5

Standardize documentation

Current state	Future state
Our team does not have a standardized process to documents patients who are experiencing financial strain.	Our team has established processes to identify the social determinants of health for any patient within the EMR.
1	2 3 4 5

Optimize care management

Current state	Future state
Our team does not have a process for responding to patients experiencing financial strain.	Our team is very confident that we can respond to a patient experiencing financial strain and have established communication processes with community partners.
1	2 3 4 5
Our team does not have a process for monitoring patients experiencing financial strain.	Patients experiencing financial strain are monitored using EMR processes and care plans are consistently updated at appropriate time intervals.
1	2 3 4 5

Coordinate care in the medical home

Current state			Future state	
We do not know where to access psychosocial supports for patients experiencing financial strain.			Our team is aware of the skills each member possesses in the medical home and we have defined roles which are cross-trained in supporting patients who are experiencing financial strain.	
1	2	3	4	5

Coordinate care in the health neighborhood

Current state			Future state	
The team does not have a full/good understanding of the current community agencies or assets.			The teams know how to access community resources and has documentation that enables care collaboration and mitigates patient privacy concerns.	
1	2	3	4	5
Patient's are referred to external programs.			Two way communication exists between the patient's medical home and external resources.	
1	2	3	4	5