

Cost of Care/Quality Conversation Screening Tool

Understanding a patient's social needs can be challenging: your patients may not speak or read English well, they may be concerned about divulging sensitive information such as immigration status, or they may have previously had negative experiences in attempting to address their social needs.

Below are some tips to ensure your screening process is patient-centered, while also capturing your population health data.

Five Keys to a Great Screening Tool¹

1. Make it short & simple:

Patients have so many forms and questionnaires to complete when they visit a doctor these days, keep your tool brief to ensure it is completed fully:

- Short, with a maximum of 12 questions
- Written at a fifth grade reading level to accommodate low literacy populations
- Translated into other languages, ideally those that are most prevalent in your clinics

Keeping your screening tool brief may be easier if you leave out benefits assessments or full intake questions. Follow the example of depression screening: your initial screening helps identify the potential need, while follow up questions with a clinician diagnose if the patient has depression and how to address it.

2. Choose clinically validated questions at the right level of precision:

Identify targeted questions that match the need for your intervention and population. Watch out for broad questions that may generate false positives, narrow questions that do not catch enough patients, or questions that are relevant to specific patient demographics (e.g., pediatric or senior populations).

3. Integrate into clinical workflows:

Social needs are part of a much larger patient journey and care plan. To successfully provide whole person care, we must expect providers to have the same understanding of patients' social needs as they do of their clinical needs — and then equip them with the tools to act on what they hear from patients.

Cost of Care/Quality Conversation Screening Tool (cont.)

4. Ask patients to prioritize:

Just because a patient screens positive for social needs doesn't mean they would like help working on those needs. Talk to your patients about their priorities, goals, and strengths to clarify whether there are useful ways for your health system to provide support services.

5. Pilot before scaling:

There is no standardized screening tool used by all health systems today, you may design a tool that takes questions from multiple instruments. To ensure it is truly patient-centered, pilot the screening tool with a smaller patient cohort before offering it to your entire patient population.

Sample Financial Burden Screening Questions

Below is a list of financial burden screening questions compiled from literature and the Robert Wood Johnson Foundation (RWJF) Cost Conversations Projects grantees.

Financial Hardship:

- Thinking back over the past month, how often have you had serious financial worries?²
- On a scale of 1 to 10, with 10 being the most severe and 1 being the least severe, how would you rate your financial hardship in the last 12 months?³

Social Determinants of Health:

- Please indicate how often this describes you: I don't have enough money to pay my bills: Never, Rarely, Sometimes, Often, Always.⁴
- Sometimes people find that their income does not quite cover their living costs. In the last 12 months, has this happened to you? Yes, No, Don't Know. ⁵
- How difficult is it for you to live on your total household income right now?⁶
- In the next two months, how much do you anticipate having to reduce your standard of living to the bare necessities of life?⁷

² Creed PA, Macintyre SR, "The Relative Effects of Deprivation of the Latent and Manifest Benefits of Employment on the Well-Being of Unemployed People," Journal of Occupational Health Psychology 6, no. 4 (2001): [324-331], <http://psycnet.apa.org/record/2001-18503-005>

³National Patient Advocate Foundation

⁴ Steven G. Aldana and Wendy Lijtenquist, "Validity And Reliability Of A Financial Strain Survey," Financial Counseling and Planning 9, no. 2 (1998): [18], <https://afcpe.org/assets/pdf/vol922.pdf>, accessed in Health Leads Social Needs Screening Toolkit

Cost of Care/Quality Conversation Screening Tool (cont.)

Cost of Medication & Care:

- How much do you typically pay out-of-pocket per month for all your prescriptions? [URMC*]
- In the past 12 months, have you ever skipped doses to make a medication last longer?[URMC]
- In the past 12 months, have you ever taken smaller doses of medication to make the medication last longer? [URMC]
- In the past 12 months, have you ever failed to fill a prescribed medication because of the cost? [URMC]
- In the last 12 months, did you skip medications to save money?⁸
- In the last 12 months, was there a time when you needed to see a doctor but could not because of cost? Yes, No.⁹
- In the last 12 months, have you experienced a financial hardship due to the cost of your medical care? Yes, No, Not Sure/Don't Know.¹⁰
- Do you have to dip into savings to pay for a medical visit, test or procedure?¹¹
- In the past 12 months, have you ever spent less money on food, heat, or other basic needs so that you would have money for medicine? [URMC]

* The University of Rochester Medical Center (URMC) was one of the RWJF Cost Conversations Project grantees. They were focused specifically on financial burdens related to affording medications, as opposed to care more broadly.

5 Measuring Financial Literacy: Questionnaire and Guidance Notes for Conducting an Internationally Comparable Survey of Financial Literacy (Organisation for Economic Co-operation and Development, 2011), [18], <https://www.oecd.org/finance/financial-education/49319977.pdf>.

7 Vinokur AD, Price RH, Caplan RD, "Hard Times and Hurtful Partners: How Financial Strain Affects Depression and Relationship Satisfaction of Unemployed Persons and Their Spouses," *Journal of Personality and Social Psychology* 71, no. 1 (1996): [166-179], <http://psycnet.apa.org/record/1996-01782-012> 6 National Patient Advocate Foundation

8 Agency for Healthcare Research and Quality, Medical Expenditure Panel Survey (2011), https://meps.ahrq.gov/mepsweb/survey_comp/survey.jsps, accessed in Health Leads Social Needs Screening Toolkit

9 Social Needs Screening Toolkit (Health Leads, 2016), [14], <https://healthleadsusa.org/wp-content/uploads/2016/07/Health-Leads-Screening-Toolkit-July-2016.pdf>.

10 National Patient Advocate Foundation

11 Ibid