

# FINANCIAL ADVOCACY NETWORK

Resources & Tools for the Multidisciplinary Team



## Improving Patient Satisfaction with Your Financial Advocacy Program

Helping patients with their financial needs will improve overall patient satisfaction. Aside from receiving the diagnosis of cancer, the financial impact of treatment can be the most stressful component for patients. Identifying financial assistance programs and resources available to patients and their families will help reduce some of the stress on the patient.

Key steps include:

- ***Gathering information and resources.***  
Identify all applicable patient assistance programs and community resources available.
- ***Gaining provider buy-in and support.***  
Work with your providers to help promote the programs available. Letting the providers know what financial impact these programs can provide for the patient will most certainly get buy-in from them.
- ***Marketing the program and resources to patients and their families.***  
Show patients that you are there as part of their team to make sure they get the care they need and can help by identifying program and resources that are available to them. Make sure they know you want to hear from them about their needs and that you will work to help them get their needs met.
- ***Sharing your program's successes with patients and providers.***  
As part of the patient's team you need to share the successes you have had in helping patients through financial assistance programs or drug recovery programs and community resources.
- ***Showing patients the financial benefits received from the program.***  
Sending a letter to the patient stating the amount that was paid from the assistance program along with any balance that is still owed keeps them informed.
- ***Surveying patients to gain feedback and opportunities to improve and demonstrate patient satisfaction.***  
Use a survey to get feedback from the patient and to demonstrate both the financial impact of the program and patient satisfaction with financial advocate services.

## Improving Patient Satisfaction Step-by-Step

### Identifying all applicable patient assistance programs (PAPs)

Create a list of all of the financial programs available to pursue with your patients. Begin by identifying:

- manufacturer assistance
- foundation assistance
- prescription drug assistance
- drug replacement programs
- grants that may be available to help pay for medical services such as imaging and office visits.

ACCC's [Patient Assistance and Reimbursement Guide](#) can be an invaluable tool in this process.

Identify any program requirements that patient must meet to apply for these assistance programs *before* meeting with the patient.

Develop a process in which the Patient Financial Advocate identifies potential sources for help specific to the patient's treatment *before* meeting with the patient and family.

Create a form that includes a list of benefits the patient will receive with his/her insurance plan and that identifies opportunities that patient assistance programs (PAPs) can offer. Make sure the Patient Financial Advocate has the patient consent forms necessary for each PAP to register the patient.

### Identifying community services/resources

Create a list of all community services available to patients and their families. Your program's Patient Financial Advocate can work proactively to network within your community to identify these resources. Examples that may be available include:

- Look Good Feel Better program through the American Cancer Society
- Support Groups
- Complementary Services, such as massage therapy, laughter therapy, acupuncture, etc.
- Free cleaning services
- Free daycare during treatment appointments
- Free hairstyling services
- Permanent make-up services
- Free meals
- Discount on utilities.

When the Financial Advocate meets with patients to see what their needs are, the Advocate can talk with patients about additional community-based resources that are available.

### Fostering Provider Support for the Financial Advocate Role

Provider support for the role of the Financial Advocacy Program and provider promotion of the patients meeting with a Financial Advocate can improve patient satisfaction.

To gain provider support, show providers the need for all patients who will be starting treatment to meet with a Financial Advocate to go over the patient's health benefits and the assistance programs available to them. Let providers know that the Financial Advocate needs to meet with patients prior to the start of their first treatment. So that providers get a clear picture of the process, the Patient Financial Advocate can present the information to the provider as if presenting to a patient. The Financial Advocate should explain the timeline and requirements for any applicable PAP so that providers know why the process needs to be completed before the start of treatment.

Foster provider champions for the Patient Advocate role by providing examples of how patients have benefited from PAPs and access to community resources.

Ask that mention of the Financial Advocacy Program be included in the provider visit with the patient during which the provider identifies the treatment regimen and consents the patient. Offer to provide a script for providers that explains that:

- Financial Advocate services are available in the clinic.
- Advocates will discuss the benefits the patient has under his or her insurance coverage
- Advocates are available to work with the patient on opportunities that might help with any out-of-pocket costs.
- The provider will schedule an appointment for the patient with the Financial Advocate who will review financial opportunities.

If the Patient Financial Advocate has business cards, the provider can give one to the patient so that he or she can contact the Advocate directly with any questions or change the scheduled appointment.

### **Meeting with the Patient and Family**

When meeting with the patient and his or her family, the Patient Advocate can emphasize that the Patient Financial Advocate is a member of the cancer team who is available to discuss any patient financial concerns or needs in terms of their cancer treatment.

A scheduled financial assistance appointment provides time for the Patient Financial Advocate to explain the potential financial help that will be available to the patient and family. This appointment is an opportunity for the Financial Advocate to let patients know about any specific requirements, such as signing a consent form or providing proof of income, and to let patients know that the Financial Advocate is available to represent them and help with the process of signing up for a PAP if needed.

### **Marketing the Financial Advocacy Program to Patients and their Families**

In marketing efforts, emphasize that the Financial Advocate is a member of the cancer care team who is there to help patients with financial issues related to their cancer treatment. Promote this program and process as a service the clinic has available to patients at no charge.

Share the financial revenue success you have with each patient and his or her family. This helps to show how the partnering between the patient and the Financial Advocate has paid off.

Track the total amount of dollars paid on the patient's deductible and out-of-pocket costs on a spreadsheet, and then share this information with the patient. This will give the

patient a visual picture of what was saved through these programs and will help reduce the patient's stress related to worries about how they are going to pay their medical bills.

Send a letter or meet with patients to show them how much financial advocacy efforts were able to help with their treatment. When communicating this information, include an opportunity to complete a patient financial satisfaction survey. Always thank patients for allowing your cancer program to take care of them and ask if there is anything else you can do for them.

### **Creating a Financial Advocacy Program Survey**

This survey can be used as a tool to improve both your program and patient satisfaction. In creating the survey, provide options for respondents to be anonymous or to provide their name, if they wish. Ask simple "yes" and "no" questions and assign point-values to the questions so that the survey can be scored. Sample Patient Financial Advocacy survey questions might include:

- Did your provider let you know about the Patient Financial Advocate Program?
- Did the Patient Financial Advocate meet with you before the start of your first treatment?
- Did the Patient Financial Advocate explain the insurance benefits of your insurance plan as it pertains to your treatment?
- Did the Patient Financial Advocate provide you with resources that may help you with your out-of-pocket costs?
- Did you consent to register for any of the financial resources that were discussed with you?
- Did the Patient Financial Advocate discuss other resources available to you within your community?
- Do you feel the Patient Financial Advocate was beneficial to you?

Make survey questions specific to the programs you offer so that you can see if these are meeting patient needs. Include an open-ended question so that respondents can provide feedback to the Patient Financial Advocate and to allow for interaction and possible revision of the program. Finally, put the survey results to work for your program. Allow for changes to happen and provide feedback to patients to show that you listened and that their input is important. These steps will help improve patient satisfaction.