TEAM CARE PLANNING ROLES & RESPONSIBILITIES

Reducing the Impact of Financial Strain (RIFS)

This template may be used to guide team discussions about assigning roles and responsibilities related to process improvements for patients experiencing financial stain. Sample process steps are included but it is best to modify and adapt it to suit your team's needs.

TIPS:

- Use your current state **process map** as a reference
- Consider adding steps that may be missing from your current state process map that could be worth including – potentially involving PDSA trials
- The first two 'Who?' columns allow for exploration of who **could** technically be responsible for the step with regard to:
    - Scope of practice, professional designation, etc.
    - Previous experience
    - Personal interest
    - Time and availability
- In some instances, the person or role currently responsible for the process may make perfect sense – after a brief discussion, simply document and move on to the next step
- It's helpful to keep in mind that the physician or nurse practitioner may be able to do all of the steps; however, sharing the load across the team is the goal
- The grey 'Who?' columns are intended to clarify who specifically will be **responsible** for each process step
    - This could be one person, more than one person, or a 'role' (e.g. MOAs)
    - For each process step, consider also designating at least one person to be cross-trained as back-up
    - Cross training also allows team members to 'stretch' in their roles and build their skills
    - Ultimately, as many members of the team as possible should be able to do as many of the tasks as possible
- Remember to PDSA – what seems like it will work in a planning meeting may not work exactly as planned in practice!
- The EMR guides can be a helpful tool for generating EMR lists or adding point of care reminders

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Process Steps	Who?			
	could do it (in scope)	has interest/ experience/availability	RESPONSIBLE	CROSS-TRAIN
Examples of process steps provided below:				
Generate list of patients from the EMR who are due to be screened for financial strain • *Patients who have never been screened before* • *Patients due to be re-screened*				
Check to see if the patient has an upcoming appointment, and if none, contact patient to offer one, if appropriate				
Add a point of care reminder to patient's chart				
Generate a referral(s), if needed				
Track the referral(s), if needed				
Generate a list of patients from the EMR who have screened positive and have not had an appointment in over 6 months				