

REDUCING THE IMPACT OF FINANCIAL STRAIN: A PILOT PROJECT



Kalyna Country PCN are participating in a pilot project to improve health care for our patients. There is only one question asking about your financial status. Your response is confidential. The questionnaire will take less than a minute. Please fill it out before you see your health care provider and give back to the receptionist.

“Do you ever have difficulty making ends meet at the end of the month?”

Yes

No

THANK YOU for taking the time to share your financial concerns. I feel that, as your health care provider, understanding you and your life can help me work with you to improve your health care and well-being.

WHAT MATTERS TO YOU!





REDUCING THE IMPACT OF FINANCIAL STRAIN PROJECT TOOL

WHAT MATTERS TO YOUR PATIENT!



McLeod River PCN: Patient Questionnaire

Social Determinants of Health

Date:

We care about you. And your health. That's why we want to ask you some questions about your finances. Financial strain is a risk factor for many health conditions such as diabetes, cancer, mental health and heart disease.

We hope you will feel comfortable answering each of the following questions. Your information will remain confidential and only shared with your care team as guided by your doctor.

1. Do you every have difficulty making ends meet (paying your bills) at the end of the month?
 Yes
 No

2. If you were prescribed medications, would you have any trouble purchasing your medications?
 Yes
 No

3. Have you missed any medical appointments due to transportation?
 Yes
 No

4. Do you have a safe place to live?
 Yes
 No

5. Have you felt alone or lonely?
 Yes
 No

6. Do you feel well supported by family or friends?
 Yes
 No

Your doctor will review your answers and may wish to refer you to appropriate services for support. Thank you for taking the time to answer these questions.

Reducing the Impact of Financial Strain Clinician Guide

Purpose

Financial strain can negatively impact the health and wellbeing of individuals. ***Reducing the Impact of Financial Strain (RIFS)*** is a pilot project designed to offer assistance to community members experiencing financial strain related challenges.

Eligible patients

Any SASPCN patient that resides within **Sturgeon County, AB.**

Sturgeon County Hamlets:

Alcomdale, Calahoo, Carbondale, Cardiff, Lamoureux, Mearns, Namao, Pine Sands, Riviere Qui Barre, & Villeneuve

Sturgeon County Towns:

Bon Accord, Gibbons, Legal, Morinville, & Red Water

Process

- 1) The clinician informs the patient that SASPCN is participating in a project regarding the impact of financial strain and its effect on our patients and community members.
- 2) The clinician asks the patients if they would like to participate in the project. If the patient is agreeable, please provide them with the RIFs screening tool to complete.
- 3) If the patient answers yes to any of the first 4 questions, please offer the financial strain resources handout and any other applicable resources.
- 4) If the patients is agreeable to be contacted by a PCN staff member (Community Innovation Liaison [CIL]), please send a general referral form and state "Refer to RIFs" in details. Include whether any resources were provided.
- 5) If the patient denies a referral, the completed screening tool is still required by the RIFs project for data collection purposes.

Data Collection

Document the following and send same to the RIFS CIL as it is required by the RIFS project:

- Completed RIFs screening tool, regardless if referral accepted
- Patient name, DOB and PHN
- Referral form, if referral accepted

RIFS CIL will follow-up with the patient to assess whether the patient can be connected with additional resources.

Any questions contact Stephanie Karkutly 780.934.5243 or Pamela Germain 780.916.2779.

Reducing Impact of Financial Strain Clinician Guide

Purpose

Financial strain can negatively impact the health and wellbeing of individuals. The purpose of the *Reducing Impact of Financial Strain (RIFS)* project is to offer additional assistance to community members experiencing risks and challenges, related to financial strain, by connecting them with the Primary Care Networks' Community Innovation Liaison (CIL). Following are the steps and process to refer an eligible patient to the RIFS project.

Eligible patients

Any SASPCN patient that resides within a **Sturgeon County, AB** postal code.

Process

- 1) The clinician identifies the patient may be experiencing financial strain. Follow up questions to consider:
 - “Do you have any difficulty making ends meet?”
 - “Do you have difficulty affording food?”
 - “Do you have difficulty affording your medications?”

- 2) If the patient answers **YES** to **any of the above** the clinician should:
 - Offer the financial strain resources handout and any other applicable resources
 - Offer a referral to the RIFS CIL (Stephanie) for assistance accessing services
 - Document the following and send same to the RIFS CIL (whether or not accompanied by a referral) for data collection required by the RIFS project:
 - **Patient name, DOB and PHN**
 - **Doctor**
 - **Which questions they answered yes too**
 - **If resources were provided**
 - **If the patient accepted a referral**

Referral

- Use a general referral form and state “Refer to RIFs” in details
- Please ensure the above information is included with the referral form

RIFS CIL will follow-up with the patient to assess whether any additional assistance or resources is required. CIL will send a treatment summary letter to Physicians of patients referred.

Any questions contact Stephanie Karkutly 780.934.5243 or Pamela Germain 780.916.2779.

REDUCING THE IMPACT OF FINANCIAL STRAIN

Patient ID:

Financial strain is a risk factor for many health conditions such as diabetes, cancer, mental health and heart disease.

The questions below ask about finances, housing and the social supports in your life. Resources are available; however, people are often unaware or have difficulty accessing them. Your family doctor and health team are here to help. We respect your privacy and answers will remain confidential.

Please select yes or no for the questions below:

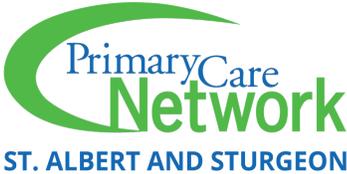
Are you experiencing difficulty making ends meet? YES NO

Do you have difficulty affording your medications? YES NO

Do have difficulty affording food? YES NO

Have you done your taxes for the prior tax year? YES NO

Would you like to be contacted by a health team member with the St. Albert and Sturgeon Primary Care Network to discuss financial resources that may be available to you? YES NO



Document # 1	Title: Standard Operating Procedures for Reducing the Impact of Financial Strain	Print Date: [Date]
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Effective Date: January 2, 2020	Reviewed and Approved By: [Reviewer's Name]	Date Reviewed: June 2020

Purpose: The rationale of this project was to identify Sturgeon County residents experiencing financial strain and connect them with possible helpful community resources.

The purpose of this document is to help guide other Clinic Improvement Facilitators (CIF) and Community Information Liaisons (CIL) in implementing and managing this project in other primary care physician's offices; as well as, to provide a guide for clinics considering implementing a financial strain screening tool for their patients.

Scope: This project was carried out at the Associate Medical Clinic in St. Albert, Alberta. The process affected the workflow of the physician, medical office assistant (MOA), and the clinic manager. A project manager, CIF and a CIL from the St. Albert and Sturgeon Primary Care Network assisted in implementing and managing the project.

Responsibilities:

Project Manager

- Responsible for managing and overseeing the project from start to finish
- Liaises with Alberta Medical Association and Alberta Health partners
- Assists in developing screener to test for patient financial strain
- Assists in developing resource documents provided to patients experiencing financial strain
- Completed Visio diagrams to demonstrate clinic workflow
- Assisted in writing a script for the MOA to utilize when asking patients to complete the screener
- Assisted in writing a script for the MOA to utilize when working with patients who may have tested positive for financial strain
- Writes project charter
- Acted as a resource and guides the CIL on processes to connect with community partners

Guidelines for Telephone Wellness Checks

April 27 - 2020

This is a guideline to help health team members conduct wellness checks with their patients over the phone.

Purpose:

Wellness checks are an opportunity for health team members to check in with patients with chronic health and social issues that may require support during a pandemic.

The purpose of a wellness check is to determine how the patient is doing and offer additional supports and resources as needed.

Additional supports may include appointments with other allied health team members/family physicians and/or connections to community resources.

Purpose of this document:

This document provides suggestions for health team on how to conduct a wellness check.

Depending on the scope of our role and level of comfort asking the questions, you can pick which domains and/or questions you would like to ask patients.

Similar to your clinical work, if the patient expresses concerns in an area that is typically outside your scope of role, you can refer them to the appropriate health team member for further assessment and consultation.

Wellness Checks

Introduction Script (optional)

Hello,

My name is _____ and I am a _____ calling from Dr. _____'s office. May I please speak with _____?

I am working with Dr. _____'s patients to see how they are doing during the COVID-19 outbreak. To support physical distancing, we are supporting patients where we can by telephone.

1. Do you have time to answer a few questions about your health and how you are doing?
2. Do you need any information about the symptoms of COVID-19 and how to access a self-assessment/who to call? [*Link for self-assessment and 811*]
3. Generally, how would you say you are functioning these days?

[if patient describes doing well and not having any concerns, ask if there is anything your physicians' team could offer them. If answer is no, you can state, "it sounds like at this time, you are coping very well. Please don't hesitate to reach out if anything changes as we are here to support you- *offer how they can contact you*].

4. This can be a time of financial strain. Are you having any difficulty making ends meet?

Follow up Questions by Domain

[Note: Health team member may determine which questions they would like to ask below. You do not need to ask every question- these are meant to give you ideas of questions you could ask in different domains of functioning.]

PHYSICAL SYMPTOMS:

- Are your symptoms about the same, worse, or better in the past week? Any new symptoms?
- What are you doing to manage the symptoms? (heat, cold, distraction, stretching, medication, etc)
- Do you notice when your symptoms are worse? -better?
- Sometimes stress and poor sleep can bring on physical symptoms such as pain. Is this beginning to affect you? Tell me more about this.

CHRONIC DISEASE MANAGEMENT:

- Do you have enough medications for the next 2 weeks? If no: why not?
- Do you have difficulty accessing medications during this time? (*reiterate pharmacies are offering delivery*)
- Are you experiencing any concerns with managing chronic health conditions?

*Note you can defer to family doctor for follow-up

MOOD:

- How are you doing emotionally?
- Have you noticed any changes in your mood?
- What things tend to affect your mood (i.e. watching the news, connecting with family and friends, etc.). What makes it better or worse?

*if concerns above consider risk assessment below

SAFETY AND RISK ASSESSMENT: Based upon comfort of clinician

- How are things going at home?
- Do you feel safe at home?
- Suicide: If concerned about suicide risk either ask PHQ 9 questions over the phone or ask, "Do these depressing thoughts (or use words that the pt has used) ever take you to the point of considering hurting yourself or ending your life?" If yes, inquire about history, specific plan, supports/protective factors.
- Self-harm and/or harm to others: Are you at risk of hurting yourself or someone else?
- Domestic Violence: Are you living in a safe environment? (*we can provide resources or more info here*)

- Substance: Are you concerned or is someone in your life concerned about your overuse of medications, alcohol, cannabis, or illicit drug use.

FINANCIAL STRAIN:

- Have you or anyone in your household lost employment income due to the Coronavirus?
- Have you accessed EI or Emergency Funding offered by the Canadian government?
- Have you completed your taxes to ensure you will receive maximum benefits possible?
- Are you able to afford food and/or your medications?
- Would you like me to email you some resources that may help?
- Would you like to be referred to SASPCN for assistance or more information on accessing these resources? ***(if patient has sturgeon county postal code for referral to RIFs project)***

SLEEP:

- Do you feel that you are getting enough sleep? Onset insomnia? Waking in the night?
- Do you notice what makes your sleep worse? -better?
- Has there been a change in your sleep pattern in the past week?
- Are you maintaining a regular sleep schedule? -even if you are at home?
- Do you take any sleep aids?

DIET:

- Are you eating regularly?
- Have there been recent changes in your eating pattern?
- Are you having difficulty accessing food during this time?

DAILY ACTIVITIES:

- With many services closed around the city, it can be a challenge to keep active and keep yourself busy. What enjoyable activities have you been able to do during this time?
- Are you able to be active? What are you doing for physical movement/exercise?
- What types of hobbies/leisure/fun activities have you been doing?
 - How much time are you spending doing these activities?
- In what ways have you been able to maintain structure in your daily life?

SOCIAL:

- How have you been able to connect with your family or friends?

Conclusion Script

Thank you for taking the time to speak with me today. Given your concerns regarding _____, I would like to connect you with _____.

[i.e. if mental health is identified as a concern, consider stating:

“From our conversation, I hear you are.....

[feeling disconnected and lonely; struggling with anxiety and/or problems with low mood; having a hard time coping].

For this reason, I’m wondering if you would be open to having one of our mental health consultants call you?]

Did you have any other concerns we didn’t cover today?

If anything else comes up, you can contact me by *[through family doctor, through central line, etc.]*

After the appointment

- Make sure you chart the patient interaction in the EMR. Highlight any concerns and interventions you provided.
- If you are in a centralized team, send back to the family physician as you would any other appointment.

Helpful tips

- Commend the patient for the things the positive actions that they are taking, for positive attributes and attitudes that you notice.
- Encourage patients to focus on small steps that they can take right now.
- Identify areas of concern or areas in need of further attention and offer recommendations, resources, or referral to services.
- You can provide resources to patients by using encrypted email as appropriate.
- Where possible, do a warm hand off to another team member by sending a formal referral or speaking with the provider directly
 - Any referrals require the information garnered from this interaction to be provided/attached to the referral

Helpful resources

- Changes, closures and resources during COVID 19:
 - https://cfpcn.sharepoint.com/:w:/r/share4d_drive/Shared%20Documents/Service%20Delivery/Health_Home_Community/Community%20Organization%20Information%20Covid%2019.docx?d=w78553e175eb84e8b8c8edafad9a10698&csf=1&e=rf0laA
- Resources for anxiety:
 - www.anxietycanada.com is an excellent resource for youth and adults struggling with anxiety.
- Please see financial strain handout for financial resources.