

Healthcare Navigation Checklist

For Family Caregivers and Care Partners

Finding the right care and making informed decisions for a family member or friend can be hard. Take the time to write down and ask questions at each step of the way.

You can download and print more copies of this checklist as a starting point. Bring this with you to appointments. Additional copies of this checklist may be downloaded and printed from FAIRHealthOlderAdults.org

Choosing a Healthcare Provider

(Take notes you can refer to later.)

- If your family member or friend doesn't have a primary care provider (PCP), or would like to switch providers, call their insurance provider to see which PCPs are in their plan's network.
- Ask your care receiver's PCP to refer them to a provider who's in network.
- Before making an appointment, ask if the provider takes your care receiver's plan and is taking new patients.
- If your care receiver is having a surgery or procedure, ask their doctor whether all the providers who provide their care are also in their network.
- If your care receiver's provider is out of network, ask if his or her charge is higher than what their insurer will pay and how much of the costs their plan will cover.
- Does the healthcare provider have the qualities your care receiver values (e.g., speaks their language, wait time, listens to their concerns)?
- Check the provider's location, education, training, board certifications and hospital affiliations.
- Does the provider take part in any programs that report quality measures?

Refer to the [Healthcare Quality](#) section on [FAIR Health Consumer](#) for more information.

Negotiating Costs

- Talk to the healthcare provider to ask about the service or procedure your care receiver will receive, the billing code and price.
- Record the names of the people to whom you spoke and all the codes and prices you discussed. Ask them to send you this information in writing or by email, if possible.
- Find out the provider's network status and cost of service or procedure (if out of network).
- Use the FAIR Health Consumer website's [medical](#) and [dental](#) cost lookup tools to estimate the cost of the medical or dental service.
- Compare it to what the provider is charging. Speak with the provider about payment options.

After Receiving Your Bill

- Review your bill closely.
- Use FAIR Health's cost lookup tools to check differences between FAIR Health's estimated costs and the prices you were charged by your provider.
- Call your provider's billing office and talk about the difference between their charge and the FAIR Health cost estimates.

The decision aids are not meant to be medical advice, diagnosis or treatment. They are meant to offer information to help you take part in shared decision making with health professionals. The clinical options in the decision aids should be discussed with your health professional, as each patient's condition will vary.

