

Healthcare Navigation Checklist

For Patients

Finding healthcare information and care best suited to your needs can be a complex process. Take 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 you don't have a primary care provider (PCP), or would like to switch PCPs, call your insurance provider to see which PCPs are in your plan's network.
- Ask your PCP to refer you to a provider who's in network.
- Before making an appointment, ask if the provider takes your plan and is taking new patients.
- If you're having a surgery or procedure, ask your doctor whether all the providers who provide your care also are in your network.
- If a provider is out of network, ask if his or her charge is higher than what your insurer will pay and how much of the costs your plan will cover.
- Does the healthcare provider have the qualities you value (e.g., speaks your language, wait time, listens to your 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

- Use FAIR Health's [medical](#) and [dental](#) cost lookup tools to estimate the cost of your medical or dental service.
- Compare the estimated cost to what your provider is charging.
- Speak with your provider about your 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.
- Ask if the provider can match the estimates from the FAIR Health website.
- If you need to dispute your bill, enlist the support of organizations that can help you with the process, such as the **Patient Advocate Foundation**. (patientadvocate.org)

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.

Shared Decision-Making Checklist

For Family Caregivers and Care Partners

Patients often rely on healthcare providers to tell them what care they need. But for our relatives and friends (care receivers) to get the best care, especially if they have cognitive difficulty or serious illness, they, their healthcare team and you can make decisions together. This is called shared decision making. Your provider shares medical knowledge, and you (and the person you care for) share what you want out of the care. Then you make a decision together. If your care receiver's healthcare team hasn't spoken about shared decision making, you can still take part in the process.

Use this checklist to start the shared decision-making conversation. Bring it with you to appointments. Additional copies of this checklist may be downloaded and printed from [FAIRHealthOlderAdults.org](https://www.fairhealtholderadults.org)

Before the Appointment: Think about What Matters and Write It Down

- What matters most to your care receiver in life? What are their goals for treatment? Do they want to manage symptoms or to be able to do things they can't do now?
- What would you like to know about your care receiver's health problem and treatment options? A clinician (like a nurse or primary care provider) also may be able to help you and your care receiver discuss your goals and wishes.
- Will costs affect your decision?
- Check out the recommended resources below.

During the Appointment/Discussion: Ask Questions, Express Your Care Receiver's Goals and What Matters to Them (Take notes you can refer to later.)

- I'd like to make this decision with you based on my care receiver's goals and what matters most to my care receiver and on your knowledge.

What my care receiver would like most from life is

What matters most to my care receiver is

What my care receiver is most afraid of is

Are there decision tools we can use to make this decision together?

How can I learn more about their condition and options?

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