

PLANNING TOOL FOR UPCOMING MEDICAL TREATMENT

Introduction

Patients often face multiple out-of-pocket costs related to their medical care. This includes direct medical costs, such as co-pays, premiums, or deductibles related to their appointments, tests, medications, or hospitalizations, and direct non-medical costs, such as transportation and parking. Patients also have indirect medical costs, which include lost wages related to their appointments.

Planning for their care can help patients manage their health care costs. Knowing what to expect when allows patients to plan ahead for childcare, days off, and medical care bill-paying. In fact, it has been shown that patients who knew what to expect were more adherent to their treatment plans, regardless of cost.

The following template can be helpful when meeting with patients to sketch out what the following year (or 6 months.) may entail in terms of their health care. It is, of course, impossible to predict exactly what care the patient will require over the period, but this provides them with a good starting point. In fact, patients participating in a focus group unanimously declared this tool valuable and said they would use it with all their health care visits.

Step 1: List each of the patient's currently managed diagnoses. For each diagnosis, please state whether it

will require medications or monitoring/testing in the next 12 months.

Diagnosis	Required Medications	Duration of Medications	Required Monitoring	Duration of Monitoring



Step 2: Sketch out how often the patient may require appointments, testing, or other medical care over the

next 12 months based on his or her conditions.

Month	Primary Care Appointments	Specialty Care Appointments	Tests (Blood Work, Imaging)	Other
January				
February				
March				
April				
May				
June				
July				
August				
September				
October				
November				
December				

Helpful hint: Once a potential treatment plan has been sketched out, the patient can plan for everything related to going to these appointments. They can also use their insurance information to estimate costs. If they foresee

any problems, they can discuss them with you in advance and also consult any resources for help you have provided. (See ACP Resources documents.)



Step 3: It is hard to plan for emergency care. If possible, discuss with the patient if any of his or her conditions can

lead to acute exacerbations or symptoms that require emergency care.

Diagnosis	Possible Exacerbations	Average Frequency of Exacerbations	Symptoms to Watch Out For

Helpful hint: It is time-saving and helpful to use this planning tool when educating the patient about his or

her conditions, including action plans for potential emergency care.