

How to Interview a Patient Advocate

Once you identify an Advocate for services you'll want answers to these questions:

1. **Have you handled other cases similar to mine?**
2. **How long have you been a private, independent Patient Advocate? Do you have relevant work background, training or experience providing this service? What is your experience?**
3. **What are your credentials? Are you a Board Certified Patient Advocate (or BCPA)? If not you might ask if they subscribe or adhere to a Code of Professional Standards.**
4. **What do you charge for your services? Do you require a down payment? Do you charge for mileage, or travel time?**
5. **Do you have Professional Liability and/or Errors and Omissions Insurance?** The great majority of advocates must have insurance to protect you and themselves. There are some special cases where E&O insurance is not mandatory, but those are rare. If the advocate you are interviewing says he or she does not have E&O insurance, *ask them why not*. If the answer sounds plausible, then you can decide whether you want to continue with the interview.
6. **Does anyone else pay you for helping me?** Some providers are paid a commission for placing patients into a specific facility or for a referral to other services. They may be less objective, so you'll want to know more about any potential conflicts of interest.
7. **Do you have an idea of the approximate amount of time it will take you to handle the services I need? If not, how can I get an estimate?** Every case is unique but you may discuss timelines.
8. **What is your caseload? Do you have time to handle the work I need to have done?**
9. **Do you have references?** Advocates may be understandably reluctant to give you names and contact information for references due to privacy laws. However, it would make sense to ask them if they will ask a former client to contact you to provide a reference. Alternatively, you can check their listings for true client testimonials. Become aware of their professional affiliations, and check memberships.

Additional, optional interview questions, depending on the services you need:

1. **Are you "on call" 24/7 or do you have specific hours?**
2. **Is your location in proximity to the patient?** Keep in mind that some Advocates do provide many services that do not require them to be nearby. Our care coordination routinely includes handling "back office" details, research, care coordination and state-to-state matters.
3. **Do you provide reports on the services you provide in my absence?** Important for situations where the caregiver lives in one place, but the patient – such as an elderly parent – lives somewhere else. Ask about the information provided, communication methods, and frequency.

Whomever you hire, we recommend that you get these questions answered to your satisfaction!