

**Patient Navigator Demonstration Program
(PNDP)**

SITE VISIT DISCUSSION GUIDE

Patient Navigators

DRAFT

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PNDP Structured Group Discussion Guide: Patient Navigators

This structured discussion is intended to gather information related to quality improvement goals for the Patient Navigator Demonstration Program. Patient navigators providing services under PNDP will be required to participate as part of their job and will be asked to discuss aspects of their work as navigators. The discussion will last about an hour and a half. The purpose of this discussion is to obtain information on local implementation of the navigation program. Navigator experiences with implementation will provide insights for current and future HRSA programs.

A. Introduction.....5 minutes

1. Welcome

Hello, my name is <INSERT NAME>, and I am conducting this group discussion on behalf of the Health Services Research Administration (HRSA). I work for NOVA Research Company, the evaluation contractor on this project, located in Rockville, Maryland. Thank you for taking the time to participate today. Today we will be talking about your thoughts on HRSA’s Patient Navigator Demonstration Program (PNDP). HRSA wants to learn about how the navigation project works at your site in order to improve the quality of services here and elsewhere.

In addition, HRSA is required to provide a Report to Congress—the body that provides the funding—about this project. That’s where NOVA Research comes in—we assist HRSA by conducting an evaluation of the whole program. And today we would like to have your input on what it’s like to be a patient navigator involved with PNDP. The patient navigation program is implemented slightly differently at each site where it is in place. We want to learn about how you make navigation work in your community. What have you had to do to make that happen? Before we get into that, I am going to take a minute to review some details about the group.

2. Disclosures and Ground Rules

You may skip any question that you prefer not to answer.

In all notes and reports, your name and opinions will be kept private to the extent permitted by law. All information will be reported only in aggregate, without identifying any specific individual.

The focus group will be audio recorded and researchers may review it at some point in the future in order to assure the accuracy of our notes.

Your comments will be used to understand how best to conduct patient navigator projects.

This discussion group should take approximately one and a half hours. Please remember that there are no wrong answers and that it is important to hear everyone’s opinion, so please give everyone in the group a chance to talk. Do you have any questions before we start?

Once I ask a question, please feel free to jump in with your response. After I’ve heard comments from one person, I may look to others to provide their opinions. I will not ask each person to respond to every question, but if you feel like you want to add to the discussion, feel free to speak up.

B. Assessment.....50 minutes

1. Goals, Recruitment and Daily Activities.....10 minutes

First, we’d like to confirm our understanding of the structure of patient navigation here at [*Organization Name*].

What do you see are the primary goals of the navigation project?

What do you see as the primary benefits that the project offers?

What do you do to help achieve the project goals--what do you spend most of your time doing?

PROBE.....Describe a typical day (if there is such a thing!)

Talking to patients? Talking to family members? Talking to health care providers? Talking to health care office staff? Documenting? Placing telephone calls? Traveling?

2. Working with Patients.....15 minutes

Outreach: How do you find your patients?

Outreach at health fairs, presentations at churches, other community organizations; in-reach at clinic through records reviews; referrals from providers.

PROBE.....What challenges have you faced with recruiting patients? How hard do you have to work to get patients into the project? What aspects of the project attract patients? Do health care providers assist you to recruit patients?

What is the process like to enroll someone? Describe the identification, referral, intake process.

PROBE.....Is it easy or hard? Tell me about that.

Enrollment: How do you determine whether a case is not right for navigation?

PROBE.....What are the signs that a person is not appropriate for navigation? Who decides? How is that communicated to you?

Where do you get information about the patients' medical history?

PROBE.....How does this information affect what you do? How often do you check it? What do you look for? What other sources of information about the patient do you have access to? What information is most useful to you and why? Is it easy or hard to obtain this information?

Probe.....How much interaction do you have with patients' families? How important a factor is that, or is it not a prominent feature of navigation?

Probe.....What language do you use when speaking with patients? With their families?

Probe.....What has helped to establish good working relationships with patients and their families or hindered that effort? What could be done to

improve these relationships? How do you know which patient needs a follow up call?

Documentation: How do you document what you do?

Probe.....How do you take your notes and fill out the required forms? Do you do this electronically or on paper? Do you do this when the patient is in the room, or at some other time? Do you have feedback on the forms?

Do you ever enter data into the EMR?

Probe.....What types of data are entered into the EMR? How has that process been for you? Have you received any feedback on your entries? Tell us about that.

3. Working with Others.....15 minutes

Consultation

What do you do when you have a difficult case?

Probe.....Do you have a manual or a navigation guide to consult, or do you go to a supervisor, or something else?

Health Providers and other staff:

What is the relationship like between navigation staff and health care staff, including doctors, nurses, and others involved in providing health care?

Probe.....Describe the working relationships you have with the health care providers (doctors and nurses) and health care office staff.

Probe.....What has helped to establish good working relationships or hindered that effort? What could be done to improve these relationships?

To what extent do you feel you are integrated into the health care team?

PROBE.....How easy or difficult is it to communicate with health providers? Can you think of an instance where you provided information to a health care provider? What was the response to your input?

PROBE.....Do health care staff provide input? How easy or hard is it to obtain their input?

Disease Management

What is the relationship between disease management staff and navigation staff?

Probe.....Describe the working relationship you have—do you feel that you have the knowledge and support that you need, or could you use additional DM resources?

Community-Based Organizations

Describe the working relationships you have with organizations out in the community.

Probe.....How were these organizations identified? What has helped to establish good working relationships with them, or hindered that effort?

Probe.....What could be done to improve these relationships?

Probe.....Describe any changes that have occurred over the course of this project.

Navigation Termination

How do you know when a patient is done with navigation?

Probe.....Who decides? How is that communicated to you?

Probe.....Have any of you been through a navigation case that closed out? [IF Yes:] How do you talk about it with the patient? How have patients reacted?

4. Role of the Patient Navigator.....10 minutes

What do you enjoy most about what you do?

Probe.....Do you have a favorite story that best exemplifies what navigation can do?

What services have been most critical to the patients that you work with?

Pharmacy assistance, health care coverage, help patient to obtain medications, supplies

Probe.....Is it easy to track these services with the existing documentation tools you use or not? Is information or activity being completely captured, or is part of the story being left out?

What is the most valuable skill you have or resource that you use to do your job?

Describe the skills or knowledge someone needs to be a successful navigator.

Pharmacy assistance, health care coverage, help patient to obtain medications, supplies

Which components of your training have been most useful since you started working with clients? What aspects are least useful, in hindsight?

Probe.....What would it be useful to learn more about?

What is the least enjoyable part of your job?

C. Strengths and Challenges.....20 minutes

From your perspective, what are the major strengths of the project? What do you think that navigators do well?

What are the ongoing challenges that you face in your work as a navigator?

Would you describe a frustrating case?

Probe.....How does it exemplify the most prominent challenges that navigators face?

What kinds of issues crop up when you are trying to deal with health care providers?

Probe.....Were they quick to embrace navigation, or has it been a more gradual process? Do you feel accepted by them?

What kinds of issues crop up when you are trying to deal with community-based organizations?

Probe.....Were they quick to embrace navigation, or has it been a more gradual process? How easy or difficult has it been to identify community partners?

Probe.....Do community-based organizations have their own forms, processes, and procedures to which you must adhere? How easy or hard has it been to adapt to them? Do you feel you have had the guidance and training necessary to deal with these?

Probe.....Describe a community-oriented encounter that went well/did not go as well as you'd like. What could have helped that work better?

How were the community organizations you work with identified?

What other community organizations that you would like to see involved with this project?

Probe.....What do you feel they could contribute?

What types of working relationships have you had with office staff and administrators?

Probe.....What kinds of issues crop up when you are trying to schedule patients?

Do you feel that you have what you need to meet the challenges you encounter on most days, or most days, does it feel like it is hard to move forward?

Do you need additional skills or information or assistance?

Probe.....Do you think it might be easy to get burned out on this job? What do you do to keep yourself from getting burned out?

D. Lessons Learned.....10 minutes

What key lessons have you learned that have affected your work as a navigator?
What opportunities for improvement do you see?



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Probe.....What advice would you give to someone who was thinking about becoming a navigator? What recommendations would you give? What would you tell them to avoid if possible?

Where should we focus attention to make this a better program?

E. Wrap Up and Closing.....5 minutes

We're coming to the end of the discussion. Is there anything else you think I should know about the Patient Navigator project?

Thank you so much for your time. It has been interesting and enlightening. Keep up the good work!



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