

**Patient Navigator Demonstration Program  
(PNDP)**

**SITE VISIT DISCUSSION GUIDE**

**Patient Navigator Administrators/Managers (may include Project Director, Program Coordinator and/or Lead Navigator):**

*DRAFT*

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## **Patient Navigator Administrators/Managers (may include Project Director, Program Coordinator and/or Lead Navigator): Semi-Structured Discussion Guide**

This section describes questions and probes associated with semi-structured discussions with local administrators of projects funded under PNDP. NOVA will meet with administrators initially for about 40 minutes, then will follow up at the end of the visit to discuss any remaining questions.

### **A. Welcome and Introduction**

The purpose of this discussion is to obtain information on planning and implementation of the navigation project at [Grantee Organization]. Your experience with implementation will provide insights for current and future HRSA projects.

#### **1. Navigation processes**

We'd like to confirm our understanding of the structure of your project.

What are the characteristics of navigated patients? How do they differ from the clinic population?

What are the primary needs and barriers faced by your community, and how does the PN project take these into account?

*Probe.....How were these barriers identified? What needs does the PN project fulfill within your community?*

What are the characteristics of the local health care system, and how is the PN project related to the larger system?

What needs does the PN project fulfill within your organization?

*Probe.....Who in your organization is well-informed about the status of your project and its impact? Are there any champions for your project? If so, who (position within organization, not name)? Who are the stakeholders for the PN project, and how do you communicate with them? What is the level of support for the PN project, and how do you work to influence that level of support?*

Outreach: How is outreach implemented at your clinic/health care facility?

*Probe.....How is outreach implemented and where? What challenges have you faced with respect to outreach, and what factors have contributed to the results of your outreach efforts?*

*Probe.....Do you have a sense of how many of your navigated patients come from your outreach efforts? How do you track this? Is this based on patient report, or is there another process to identify patients who enter the project as a result of an outreach effort?*

*Probe.....Have any outreach activities proven especially successful? How do you know this? Is it tracked in any way? Are there some activities that didn't work as well? What are the factors contribute to the success or lack of success with recruiting from "outside" the clinic environment?*

2. Recruitment: What is the process for recruiting and identifying patients for navigation?

How is patient recruitment implemented in your facility?

*Probe.....What challenges have you faced? Has recruitment for Navigation interfered with clinic processes and procedures? Have you heard comments—either compliments or complaints—on the Navigation project from health care staff, other staff? Do health care providers assist in recruiting patients?*

*Probe.....Have any within-clinic recruitment activities proven especially successful? Are there any activities that didn't work as well? What factors contribute to the success or lack of success in recruitment?*

3. Administration: How are navigation decisions made?

Do you have written standard operating procedures or protocols for the PNDP? Would you say that your protocols are pretty much complete, or are you still in the process of revising them? May we review SOPs and protocols?

What is the typical PN caseload? How sick are the patients and how many are diagnosed with a terminal illness?

How do PNs improve their education and learning? Is there a need for more training on specific topics? Which ones?

*Probe.....Are systematic case studies or EHR review used to assess or hone navigation focus? Are there standing meetings? If so, what are these?*

Termination of Navigation: Are there administrative indicators for termination of navigation? What are they?

*Probe.....How is it determined whether these are reached?*

4. Relationships: What is the relationship between navigators, health care providers, and other service providers? Community organizations?

Are navigators in direct contact with health care providers, or is the contact primarily with schedulers and other health care administrative staff?

*Probe.....How are relationships with health care providers established, and how are they maintained?*

*Probe.....How are relationships with administrative staff established, and how are they maintained?*

Are navigators in direct contact with community organizations and social service providers, or is that primarily handled at an administrative level?

*Probe.....How are relationships with community organizations established, and how are they maintained?*

## **B. Assessment**

Has navigation affected health care providers? How?

Has the navigator project affected relationships/partnerships with local community-based organizations (CBOs) or agencies? How many of these relationships are new since the start of the project?

*Probe.....How has the nature of your facility's relationship with CBOs changed since the start of this project? Which actions on the part of navigators or administrators have served to deepen these relationships or to increase the level of coordination? Which actions on the part of navigators have challenged these relationships? Have these challenges been addressed or are they yet to be addressed?*

*Probe.....How do partnerships and interactions with other CBOs or agencies affect the day-to-day functioning of your clinic? How might they affect matters in the longer-term? How do these collaborations impact the project objectives? How do these collaborations impact navigation services? How are collaborations tracked or assessed?*

Clinical Trials: How has navigation affected recommendations for clinical trials enrollment?

*Probe.....Have more patients been recommended for clinical trials? How do you know this? Is it tracked in any way? What gets in the way of recommending patients for clinical trials? Is it: location of trials, health provider preferences, or something else?*

Navigation Impact: What has been impact of navigation on patient care?

*Probe.....Have patients been more adherent? Have their clinical outcomes improved? Have they missed fewer appointments? Have providers commented on patient improvement?*

### **C. Strengths and Challenges**

In what ways would you say that the project is successful? (What targets have been/will be reached?) Are there specific project strengths you'd like us to be aware of?

What are the major challenges? What are the primary barriers and challenges that have been encountered? How have you handled them?

Are there areas where you would like to see improvement? Do you have a plan for that improvement? What are they?

Is there a plan for continuing PN services after this grant is complete?

### **D. Lessons Learned**

Now that you have had experience with PNDP, are there any key lessons you would like to convey?

Are there any strategies you would recommend? What are they?

*Probe.....Would you recommend that other health care organizations implement such a project? What advice would you give the administrators?*

Are there any strategies you would avoid? What are they?

## **E. Wrap Up and Closing**

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

Thank you so much for your time. At the end of the visit we will brief you on highlights of our preliminary findings and get comments from you at that time.