

**Patient Navigator Demonstration Program
(PNDP)**

SITE VISIT DISCUSSION GUIDE

Community Organizations/Social Service Providers

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PNDP Focus Group Discussion Guide: Community Organizations/Social Service Providers

This structured discussion is intended to gather information related to quality improvement goals for the Patient Navigator Demonstration Program. The discussion will elicit experiences of community-based organization and other social service providers in order to learn about optimal strategies for integrating navigator projects into the communities they serve. Participants in this group will be recruited by local PNDP staff according to community organization involvement in providing services to enrolled patients. Social service providers from within the navigator organization will also be included. This information will be shared among current and future grantees and will inform HRSA about how patient navigator projects might best be implemented across a range of community settings.

A. Introduction.....25 minutes

1. Welcome

Hello, my name is <INSERT NAME>, and I am conducting this focus group on behalf of the Health Services Research Administration (HRSA). I work for NOVA Research Company, the evaluation contractor on this project. 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). Specifically we will discuss what it’s like to be a community organization member or social service provider involved with PNDP. HRSA wants to learn about the navigation project here in [location] and how to improve the quality of services provided to patients and clients.

You are here today because you and your organization have had some involvement with patient navigation clients or the navigators who work with them. The patient navigation program is implemented differently at each of 10 navigator program sites across the country. We want to learn about how navigation works in your community. What have you had to do to make this program work for patients/clients? Before we get into that, I am going to take a minute to review some details about the group.

2. Disclosures and Ground Rules

Your participation in this focus group is completely voluntary. You can stop your participation at any time during the discussion. If you choose not to

participate or stop your participation, it will not affect your relationship with your organization, or with HRSA, now or in the future.

- *You may skip any question that you prefer not to answer.*
- 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 clinic, program, or individual.
- The focus group will be audio recorded and researchers may review it at some point in the future in order to verify the accuracy of note-taking.
- The focus group will only be used for learning about and improving navigator services.
- *<CONSENT>* Please take a few moments to read and sign the consent form I am about to distribute if you agree to participate in this group. It contains all the points I have just conveyed to you. There are two copies--one is for your records, and it contains an address where comments may be sent, if you wish, regarding this group.
- *[COLLECT SIGNED FORMS]*

This focus group should take approximately one hour. 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 ask for 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.

3. Icebreaker

Please introduce yourself to the group, using your first name, and tell the group what your role is in relation to this project. What is the nature of the service that you provide? What is your relationship with the organization operating the PNNDP project? Are you within the same organization as the navigators, or external to it? <GET COUNT>

4. Awareness

How does PNNDP work with you/your program?

How well does do PNNDP goals, as you understand them, appear to integrate with your professional goals and the goals of the organization for which you work?

How did you first learn about the PNNDP project?

Probe.....Did you get as much information as you'd like in order to be able to understand the project, and to know how to work with the navigators? Was it clear what the roles and scope of the navigators would be?

How do your clients get into PNNDP?

Probe.....Who here has ever recommended a client to PNNDP? <GET COUNT>

Probe.....[For 'referrers:'] what has that experience been like for you?

Probe.....[For 'non-referrers:'] What would make it more likely for you to send clients to PNNDP?

Probe.....Are there specific benefits that might motivate a navigation recommendation? Any change in procedures that would streamline the process?

Has a navigator ever sent a patient/client to you? <GET COUNT>

Probe.....How do you know that?

Client report, navigator called ahead, sent email notification

Probe.....[If yes:] Was that means of communication effective or not effective? Would you have preferred something different? What would that be?

Probe.....What was the reason for the recommendation? What service was intended for the client?

Probe.....Did you think the recommendation action was appropriate, or not appropriate?

Probe.....Is this tracked in any way?

Do you know which of your clients is enrolled in patient navigation and receiving services?

Probe.....How do you know this?

Through email, patient report, navigator report, EMR, other

How do navigators work with you and your clients?

Probe.....Has a navigator ever participated in logistical arrangements for a patient visit to you? <GET COUNT>

Probe.....How do you know? Was it helpful or not helpful to have that intervention?

Did this disrupt normal processes and procedures? Ruffle office staff feathers? Result in duplication of services? Result in an improved encounter?

If yes to any, In what way?

Probe.....Has a navigator ever requested that you arrange for a support service, or requested that you enroll a client in a program that you support? <GET COUNT>

Probe.....How do you know that?

Client report, navigator called ahead, sent email notification

Probe.....[If yes:] How effective was that means of communication? Would you prefer something different? What would that be?

Probe.....Is communicating in advance necessary and important, or in the nature of a professional courtesy? Would you prefer more communication, less, or are things at about the right level?

Probe.....Did you think the request was appropriate, or not appropriate? Why do you say that?

Probe.....Is this tracked in any way?

Has a navigator ever attended a client appointment with you? <GET COUNT>

Probe.....What was that like?

Probe.....Did you feel the navigator's presence was more of a help or a hindrance?

Probe.....Is this tracked in any way?

Has a navigator ever provided information concerning a patient to you? <GET COUNT>

Probe.....How was the information conveyed? For example, did the PN send you an email?

Client report, navigator called ahead, sent email notification

What broad area did the conversation concern?

Probe.....For example, did the navigator tell you about a patient's family or personal information?

Listen for: Informed about patient's culture or beliefs, clarified a misunderstanding, informed about a patient's attitude, informed about a patient's adherence or non-adherence to a provider recommendation, or patient's attendance at another provider's office, ER visit/hospital admission]

Probe.....Anything else?

B. Assessment.....15 minutes

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

Probe.....What do you see as areas with the greatest unfulfilled needs in your community? Can the PN project meet any of these needs?

How well do you think PNDP is working? Why?

Probe.....Have you heard anything about PNDP from clients, staff, or other providers? What have you heard?

Do you perceive any benefits to the client?

Probe.....What makes you say that? Is this being tracked in any way?

Probe.....Have patient navigators improved clients keeping appointments? How do you know this? Is it tracked in any way?

Probe.....Have navigators improved adherence to your recommendations or helped a client to access services? What makes you say that? Is this tracked in any way?

To what extent are navigators viewed as an integral part of the care delivery team? If yes, how? If not, why not?

Probe.....Do navigators participate in group case reviews? <GET COUNT>

If a colleague asked you about your experience with navigation, what would you say?

Does PNDP benefit the organization for which you work? What makes you say that? Is this being tracked in any way?

Probe.....What are examples of where PNDP has been successful in terms of working with you or your organization?

In your opinion, does PNDP meet the needs of health disparities populations in your community?

Probe.....If yes, how? If no, what do you see as the reasons for why not?

C. Strengths and Challenges.....10 minutes

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

From your perspective, what are the major challenges facing PNDP?

Do you have any ideas or recommendations for addressing these challenges?

Are there examples you can think of where PNDP did not work as well as you would have liked? What happened? What do you think could be changed?

Probe.....Has the communication/cooperation between your department/organization and PNDP been adequate?

Probe.....Does working with PNDP create unintended consequences for you or your organization? Has this been addressed with either the navigator or the PNDP organization?

Probe.....Was the navigator or organization responsive to your issue? Can you tell me more about that?

Any ideas about how those challenges could be met more effectively?

D. Lessons Learned.....10 minutes

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

Would you recommend that other organizations become involved with such a project?

Probe.....[If yes:] what advice would you give the providers and the organization? For example, advice on material support, staff characteristics, mode of encounter with navigator or client, nature of relationship?

Probe.....[If no:] Why not?

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. Our discussion has been interesting and enlightening.

