Measuring what navigators do for patients: Development of an instrument to assess tasks and use of social networks

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Background

- ❖ Definition of navigation varies across PNRP sites

- ❖ Complicates how to interpret evidence of different outcomes across sites

- ❖ Need to characterize what navigators actually do and thus measure variation

- ❖ Determine associations between navigator activities and patient outcomes

Background, part 2

- ❖ Observational studies of health care to characterize work design
- ❖ Literature focuses on 2 aspects:
  - Task
  - Social network
- ❖ Accomplishing task in complex networks is the essence of navigation

Objectives

❖ Define attributes of the work of patient navigators

❖ Describe variation in navigation

❖ Develop a technique for observing navigator work that produces valid, reliable data across sites

Methods

❖ Develop preliminary observation guide

❖ Use guide for data collection in 3 sites

❖ Code initial data to identify key dimensions of navigator activity

❖ Develop conceptual model

❖ Develop structured observation guide

Preliminary observation guide

❖ Broad navigator activity categories

❖ Who/what of navigators' (inter-)actions

❖ The time it takes to do things

❖ Rich narrative description of the activities

3 sites collected preliminary observation data

❖ Boston – PNs at 6 neighborhood health centers

❖ Chicago – as described earlier

❖ Rochester – PNs at 3 hospital-based primary care settings

Development process

❖ Coding of initial observation notes

❖ Coding discussions/memos

❖ Meeting of 3 collaborating sites

❖ Development/refinement of observation tool

Overview of navigator activity categories

- ❖ Working with the patient

- ❖ Working on patient's behalf

- ❖ Working on the system

- ❖ Other

Working *with* patients

- ❖ **Telling** – when & where biopsy appointment will be, what it will be like

- ❖ **Inquiring** – what are barriers to attending appointment? what are concerns?

- ❖ **Supporting** – listening to fears about treatment

- ❖ **Coaching** – what questions need to be asked at next appointment & how to ask them

Working *on behalf of* patients

❖ **Finding** – locating patients and ensuring they come in for needed follow-up

❖ **Coordinating team communication** – ensuring that rest of care team is aware of next steps

❖ **Integrating information** – ensuring that different types of patient data are integrated and documented

❖ **Seeking collaboration** – enlisting other providers in addressing patient's fears

Working on *systems issues*

❖ **Finding potential patients** – reviewing lab result logs to find patients needing follow-up/navigation

❖ **Building networks/routines** – meeting clinicians to explain role and discuss referral criteria

❖ **Reviewing cases** – checking on ticklers, open issues

Working on *other* activities

❖ **Research-related** – consenting patients, obtaining survey data

❖ **Clinical back-up** – helping out with related clinical operations such as check in

❖ **Non-PN jobs** – unrelated job responsibilities

❖ **Socializing** – informal conversation with co-workers

Elements of context that may bear on how navigators work

❖ Patient population
- Diagnosis vs. treatment
- Extent of non-cancer needs

❖ Patient navigators
- Organizational location/supervision
- Site-specific training/role differentiation

❖ Level of randomization to PN

❖ PN relation to prior design of work

Emerging conceptual model

- Program context variables shape navigation activities
- Navigator activities represent 4 main categories
- Navigation activities can be:
  - Face-to-face or virtual (phone, email)
  - Real-time or asynchronous

Tool development considerations

- Importance of mode (in-person vs. phone, other)
- Relative proportions of time on different activities
- Patient type
- Retaining aspects of narrative description

Hypothesis-generating observations

- Case identification is a very time-intensive process
- Contextual factors influence navigation at each site
- PN actions can be either reactive or proactive
- Multiple challenges in establishing a PN program/process

Next steps – Year 2

- Select 2 additional NCI PNRP sites to increase diversity of contextual factors
- Observe every navigator at each of the 5 PRNP sites on multiple occasions
- Analyze variation in tasks and networks across navigators and sites
- Conduct thematic analysis of qualitative field notes

Research team

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