Patient Navigation Program Pre-Assessment Tool

ACCC
Association of Community Cancer Centers

This pre-assessment tool can help you assess your organization and consider all aspects of a patient navigation program. This tool can also help you assess your readiness for implementation or identify areas that need to be addressed before rolling out a patient navigation program.

GOALS AND CHALLENGES

1. **Goals** for navigation program:

2. **Barriers/Challenges** to navigation program:

OPERATIONS

1. Tumor types to be covered by navigation program:

2. Will each tumor type have its own navigation program or will one navigator cover more than one tumor type?

3. Do you have team(s) to set up program(s) by disease state(s)?

4. Timeline for implementation:

5. How many patients per year will participate in the navigation program?

6. What is your anticipated patient to navigator ratio?

7. How will you identify patients eligible for the program?
   ☐ Pathology reports ☐ Inpatients ☐ MD referrals ☐ Surgical reports
   Other _____

8. What are the biggest challenges facing the patient that need to be addressed by the navigation program?

9. Where will the navigator(s) be housed?

10. What other space is allocated for the navigation program:
    ☐ Patient library/education space ☐ Counseling rooms ☐ Other offices
    Other _____

11. How will program be funded?
    ☐ Grants ☐ Patient pays ☐ Insurance
    Other _____

12. Will patients be charged for any part of the service?

13. Which salaries will be supported solely by program budget (navigator, administrative assistant, etc.)?

14. Which salaries will be partially supported by program budget (social work, PT/OT, etc.)?

15. What else will budget be used for (patient education materials, journals, etc.)?

16. Do you have an electronic charting system?

17. How will you communicate between practitioners?

ROLE OF NAVIGATOR

18. Who do you see as the navigator in your program?
    ☐ RN ☐ Social Worker ☐ Lay person/survivor
    Other _____

19. When would you like the navigator to become involved with the patient?
    ☐ Prior to entering the healthcare system ☐ At time of screening
    ☐ At time of suspicious finding ☐ At time of diagnosis
    Other (please specify) _____

20. What are the primary functions you would like the navigator to fulfill? Please rank them with 1 being the most important.
    _____ Community education _____ Patient education _____ Care coordinator _____ Financial counselor
    _____ Psychosocial counselor _____ Other (please specify) _____

21. What other activities would you like the navigator to be involved in? Please rank them with 1 being the most important.
    _____ QI/PI activities _____ Community _____ Educational programs _____ Screenings
    _____ Staff educational programs _____ Survivorship program _____ Help set up program(s) by disease state(s)
    _____ Other (please specify) _____

RESOURCES

22. What resources do you currently have in place?
    ☐ Case managers ☐ Social workers ☐ Registered dietitians ☐ Financial assistants
    ☐ Genetic counselors ☐ Chaplain ☐ Health psychologists ☐ PT/OT
    ☐ Speech therapy ☐ Home care services ☐ Hospice services ☐ Palliative care services
    ☐ PT/OT Patient advisory committee
    Support groups (specify) _____
    Other (please specify) _____

23. Do you currently have relationships with community patient support agencies such as ACS or local support groups other than hospital-based groups?

OTHER CONSIDERATIONS

24. Do you have an MD champion for patient navigation program?

25. Do MDs support the program? If not, will MDs need convincing of the need for a program?

26. Administration level support/commitment or lack of support/commitment?

27. What percentage of your population has?
    Private health insurance _____
    Medicare _____
    Medicaid _____
    No insurance _____

28. What percentage of your population is?
    African American _____
    Asian _____
    Caucasian _____
    Hispanic _____
    Native American _____
    Other (please specify) _____