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Experiences in the implementation of Navigation Programs in Hematology Services

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A Brief History of Navigation in the US...



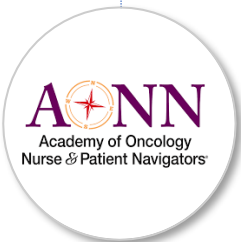
1990: 1st Pilot study in Harlem, NY among underserved breast patients; diagnostics + navigator support to address patient barriers

Outcomes: 28% decrease in late-stage presentation, 31% increase in 5-yr survival¹



2005/6: National funding from Congress, NCI, ACS, CMS for multi-site Navigation outcomes research^{2,3}

Outcomes: Studies demonstrated improved timeliness of care, adherence, access to care and quality of life, particularly in vulnerable patients³⁻⁶



2009: Academy of Oncology Nurse & Patient Navigators (AONN+) formed

Outcomes: Professional society dedicated to oncology navigation, ~9,000 members, certification exams

...A Brief History of Navigation in the US



2017: National Navigation Roundtable launched

Outcomes: Consortium to advance navigation: recommendations for training navigators⁷ & measuring outcomes⁸...



2020: ACS/AONN+ Standardized Navigation Metrics Toolkit published

Outcomes: 35 standardized metrics measuring impact of navigation on patient experience, clinical outcomes and return on investment⁹



2024: CMS approves funding for Principal Illness Navigation

Outcomes: ACS LION certification, programs across the US expanding navigation

Role of Oncology Navigator in the US

“individualized assistance offered to patients, families, and caregivers to help overcome health care system barriers and facilitate timely access to quality health and psychosocial care from pre-diagnosis through all phases of the cancer care experience”¹⁰

early definition from 2010 joint position statement by ONS, AOSW, NASW

2014 GWU Core Competencies for Patient Navigators¹¹



2018 Updated ONN Core Competencies¹²



2022 'PONT' Standards¹³

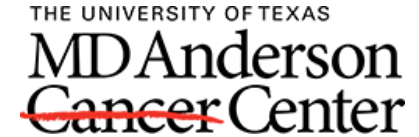
My Navigation Leadership Journey



Staff: 5 Nurse Navigators
Scope: Breast, Thoracic, Inpatient
Continuum: Diagnostics through Survivorship
Assignments: By referral
Community Partnerships: Social Work, Patient Navigation, Grants
Metrics: Caseload, Accreditation compliance



Staff: 35 Nurse & 10 Patient Navigators, 81 Intake Nurses & Coordinators
Scope: 13 disease sites
Continuum: Intake & Active treatment
Assignments: 100% New patients
Community Partnerships: Grants, Patient discounts
Metrics: Caseload, Touchpoints, % Navigated, Distress compliance, ...



Staff: 150+ Nurse Navigators & 16 Health Info Specialists
Scope: 4 Workstreams, 6 Service Lines
Continuum: Pre-Intake, Intake, Active treatment
Assignments: 100% New patients
Community Partnerships: navigator training
Metrics: 6 Program outcome measures, Navigation dashboard & workbench reporting

MD Anderson Navigator Roles & Functions

| Pre-Intake Navigation | Intake Navigation | Treatment Navigation | Acute Navigation |
|--|---|---|---|
| askMDAnderson | Access | Ambulatory | Inpatient |
| <ul style="list-style-type: none"> • Assist potential new patients pending financial clearance • Address financial barriers to care (PCP referral, authorization, un- or underinsured) • Provide education and support to access care elsewhere when financial clearance cannot be obtained | <ul style="list-style-type: none"> • Identify and address barriers to care • Prepare patients for 1st appointment and set expectations • Provide emotional support, patient education and supportive resources • Partners with Access and clinical teams • Provide disease-specific nursing expertise | <ul style="list-style-type: none"> • Identify and address barriers to care • Coordinate care throughout active treatment phase • Provide emotional support, patient education and supportive resources • Partner with clinical teams and support services • Provide disease-specific nursing expertise | <ul style="list-style-type: none"> • Identify and address barriers to care • Safe discharge planning and post-discharge support • Provide patient education • Support multi-disciplinary rounds • Partner with inpatient and ambulatory clinical teams • Provide oncology, navigation and case management nursing expertise |

Considerations in Implementing and Expanding Navigation Services

Key Stakeholders and Champions

- Executive Champions, Faculty/Physicians, Leaders, 'Early Adopters'
- Programmatic business case → Return on Investment and strategic alignment
- *'What's in it for me?'*

Program Design

- Nurse +/- Patient Navigation
- Scope of Services → Continuum of Care & duration of services
- Eligibility Criteria, Coverage & Case-finding
 - All patients or specific services lines
 - By Referral of ?? % of patients
 - How will you identify patients needing navigation?
- Caseloads & Staffing
 - Annual cases per navigator
 - Open/active cases per navigator
 - Internal benchmarking

Considerations in Implementing and Expanding Navigation Services

Patient Population

- Key characteristics: demographics, payors, unmet needs
- Patient and caregiver perspectives

Role Delineation

- What specific tasks does each navigator in your program own?
- Cross-walk with key roles (*e.g.*, Social Work, APPs, Clinic nurses)

Metrics and Reporting

- How will you measure success?
- Outcome vs. Process measures
- Align documentation with reporting

Specific Considerations for Hematology

- !! **Patient acuity** = Clinical acuity + Navigation acuity
- !! **Different routes to access care** → Emergency Room, urgent care, etc.
- !! **Additional roles to consider:** transplant nurse coordinator
- !! **Complexity of scheduling and treatment algorithms**
- !! **Transfer between institutions**

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