

Patient Navigation Assessment

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Instructions: Cancer program leaders should thoroughly evaluate their navigation programs on an annual basis to ensure they are meeting the needs of their patients, using navigators effectively, and demonstrating a return on investment. This assessment will help you evaluate your navigation program's performance across six key steps for optimizing navigation.

After completing the assessment, add up the number of "No's" within each step to determine which is the greatest opportunity for improvement.

| Step 1: Define the Program | | |
|--|-----|----|
| Question | Yes | No |
| Have you identified the top barriers to accessing cancer care in your community across the past 1-3 years? | | |
| Have you solicited physician feedback to help inform (re)design of your navigation program? | | |
| Do you routinely use process improvement to enhance cancer program operations? | | |
| Does your navigation program have clear, operational, and measurable goals? | | |
| Do the goals of your navigation program align with larger institutional goals? | | |
| Total: | | |

| Step 2: Define the Navigator Role | | |
|---|-----|----|
| Question | Yes | No |
| Is your navigation model optimized to meet the goals of your program? | | |
| Have you mapped program needs to navigator responsibilities? | | |
| Do you have a current job description for your navigator(s)? | | |
| Can your navigators articulate the goals of navigation? | | |
| Can your navigators clearly explain the boundaries of their role? | | |
| Total: | | |

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| Step 3: Secure Support for Navigation | | |
|--|------------|-----------|
| Question | Yes | No |
| Does everyone in the organization, including executives, clinicians, and staff, know the goals of your navigation program? | | |
| Do cancer physicians consistently refer patients to your navigators? | | |
| Is it easy for physicians and staff to refer patients to your navigators? | | |
| Do referring physicians understand the navigation program and its goals? | | |
| Do your navigators have relationships with local organizations (e.g., YMCA, American Cancer Society, Cancer Support Community) that provide other support services to cancer patients? | | |
| Total: | | |

| Step 4: Integrate Navigators with the Broader Care Team | | |
|---|------------|-----------|
| Question | Yes | No |
| Are navigator responsibilities clearly delineated and communicated to other members of the care team? | | |
| Do you have standardized processes for identifying patients in need of navigation? | | |
| When specific patient needs are identified that require specialized support (e.g., financial concerns, behavioral health needs), do your navigators know where and how to refer those patients to other members of the care team? | | |
| Are there documentation and communication standards for all care team members? | | |
| Do you use care coordination protocols for patients moving across settings of care (e.g., between the inpatient and outpatient settings)? | | |
| Total: | | |

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| Step 5: Track Navigator Performance | | |
|--|-----|----|
| Question | Yes | No |
| Do navigators use a standardized approach to document their activities and track individual patients? | | |
| Have you identified performance measures for your navigators that map directly to your navigation program's goals? | | |
| Is someone responsible for periodically reviewing and reporting on navigators' performance? | | |
| Do you track the impact of navigation on patient experience and/or satisfaction? | | |
| Do you track the impact of navigation on the cost and/or quality of care at your organization? | | |
| Total: | | |

| Step 6: Optimize the Navigator Role | | |
|--|-----|----|
| Question | Yes | No |
| Do navigators receive regular training and education? | | |
| For the majority of their responsibilities, are your navigators operating at top of license? | | |
| Can any of the navigators' tasks be automated? | | |
| Do you survey patients and physicians about their satisfaction with your navigators? | | |
| Do you evaluate navigator performance on a regular basis using metrics and/or stakeholder input? | | |
| Total: | | |

Next steps: Now that you've identified your greatest opportunities for improvement, contact a member of our team at ProgramInquiries@advisory.com to learn more about our supporting resources.

Source: Oncology Roundtable interviews and analysis.