

# NACI Care™ :

## A Patient Navigation Data Entry, Tracking and Evaluation Program



**Tutorial** NACI Care™ Entering PN/User Information and Tasks

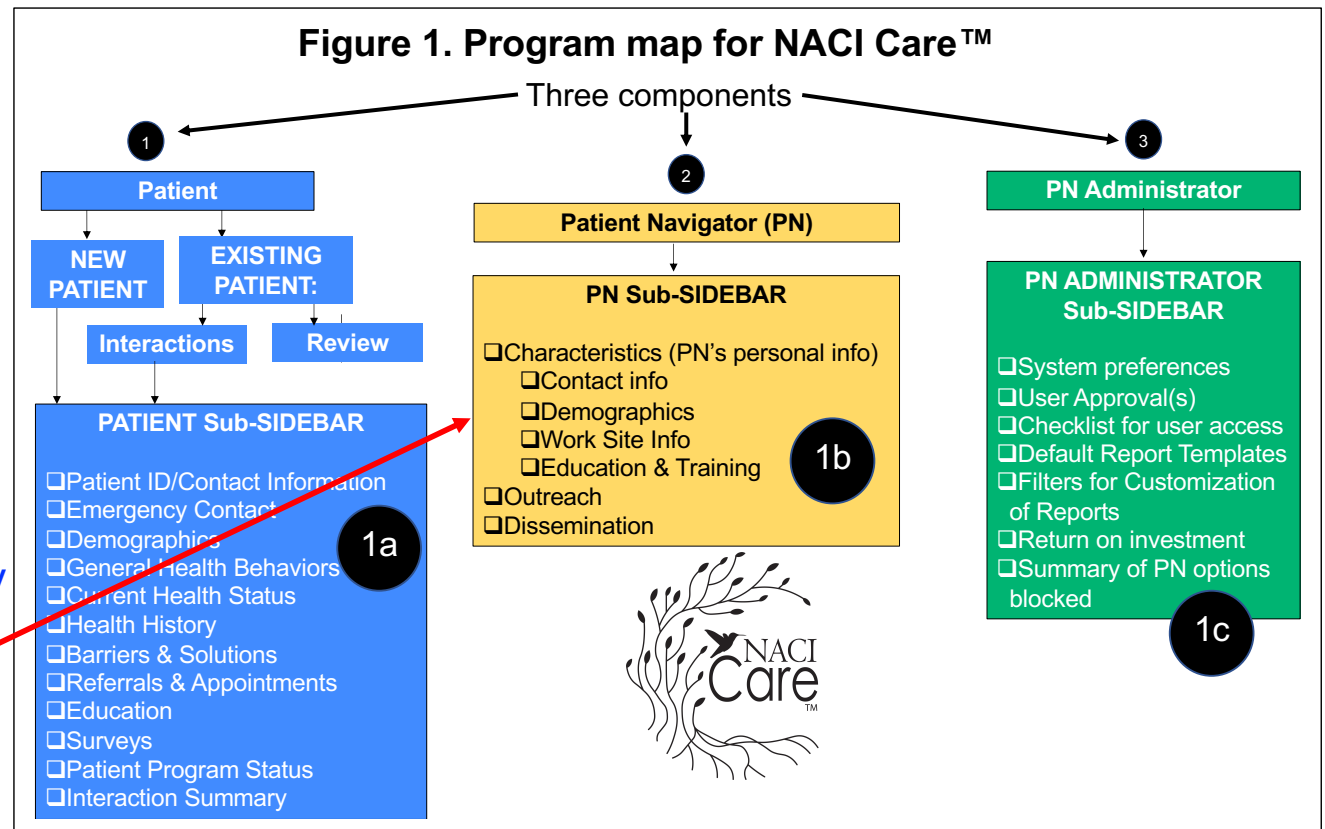
August 29, 2022



# Overview of NACI Care™: Map of the 3 Components

1. NACI Care™ has three components:
  - a. Patient information and healthcare visit data (uploaded by the PN/user/PN Adm)
  - b. PN information and activities (uploaded by PN or PN Adm)
  - c. PN Administrator functions and tailoring of NACI Care™ (uploaded/ managed by PN Administrator)

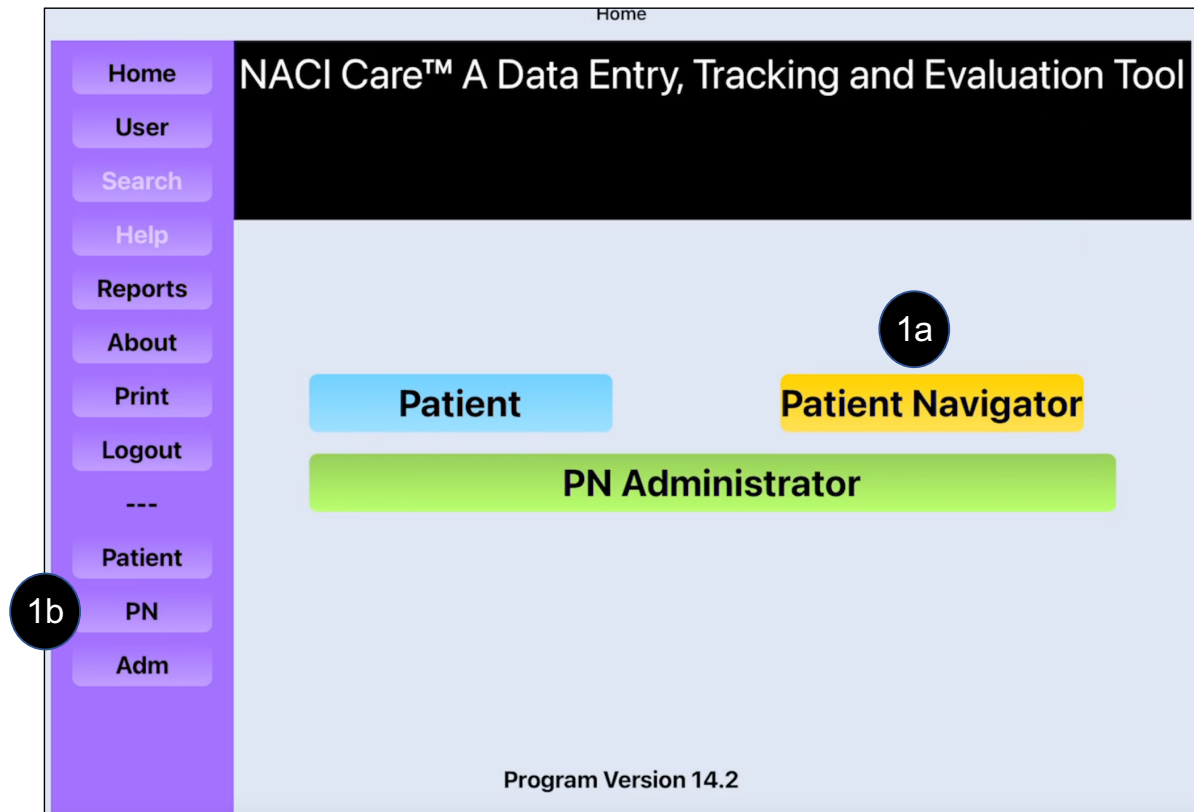
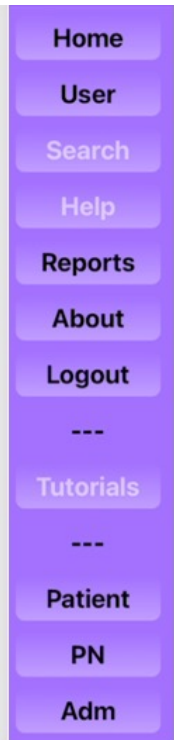
This is where you are





## Patient Navigator (PN) – Home screen

1. Select Patient Navigator to enter personal information
  - a. Home screen or
  - b. Sidebar



# Patient Navigator Characteristics



**PN Characteristics**



# Patient Navigator (PN) – PN Sub-Sidebar

- 2. PN Sub-Side bar buttons appear (left side of screen) with explanations (right side of the screen)
  - a. When selecting, choose from the buttons on the left side of the screen
  - b. The Administrator can remove items and when so, they will not appear on the screen

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- Patient
- PN
- Adm

2a

<b>Characteristics</b>	Contact info, demographics, worksite information, education & PN training (including continuing education), competencies
<b>Outreach</b>	Documentation of events where cancer information was presented: includes type of event / activity (cancer walk, education, oral presentation, etc.)
<b>Dissemination</b>	Media (print, internet, press conference, radio/tv interview), logistics, evaluation method and results

Summary of PN options blocked

PN ID: 3 PN Name: NancyVernon  
Today's Date: Aug 22, 2022

<b>Excluded</b>	
Demographics	
Gender	
Literacy & Learning	
Physical Conditions	
Medical Care	
Religion	
<b>Included</b>	
Demographics	
Birth Date	
Sexual Orientation	
Race & Ethnicity	
Height/Weight	
Language	
Health Insurance	
Education	

2b



# Patient Navigator (PN) – PN Sub-Sidebar – PN Contact Info

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## 3. Select Characteristic

- a. Two options: Personal and Emergency
- b. Personal address, phone
- c. Emergency contacts is name(s), address(es), phone for individuals to be contacted in case of emergency.

3

Characteristics

Outreach

Dissemination

3a

Personal Contact Information

Emergency Contact

Personal Contact Information

PN ID: 3 PN Name: NancyVernon

Today's Date: Aug 22, 2022

Nancy Vernon

55555 Happy Road

pleasantville CA - California 90999

310-555-5555 Phone(Work) Phone(Cell)

NancyV@gmail.com Other

Cancel Submit

3b

Emergency Contact Info

PN ID: 3 PN Name: Nancy Vernon

Today's Date: Aug 22, 2022

Henry Vernon

Address

City State Zip

Phone(Home) Phone(Work) Phone(Cell)

Email Other

Cancel Submit

3c

# Patient Navigator (PN) – PN Sub-Sidebar – PN Demographics



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## 4. Select Demographics

a. Select specific PN demographics and fill in information

1) For example, sexual orientation

Contact Info

Demographics

Work Site Information

Education & Training

Date of Birth

Gender

Sexual Orientation

Race & Ethnicity

Religion

Education

Sexual Orientation?

What is your sexual orientation?

Lesbian

Heterosexual

Gay

Lesbian

Bisexual

Questioning

Cancel Submit



# Patient Navigator (PN) – PN Worksite

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5. Worksite information for where PN works, when hired, and when left (if applicable)
  - a. on “Add a new work site info”
  - b. Add the worksite contact information
  - c. Add date of hire (as a PN)
  - d. If works in multiple settings, enter each address and location

Contact Info

Demographics

Work Site Information **5**

Education & Training

Add a new work site info **5a**

Work site information **5b**

Date of hire

Date of release

Name of organization **5b**

Name of organization

Name of department

Name of department

City State Zip

City State Zip

Type of work setting **5d**

Type of work setting

Hours worked per week

Hours worked per week

Set hire date **5c**

Please select date





# Patient Navigator (PN) – PN Education and Training

6. Select Education and Training to document specific, previous PN training
  - a. Select, Did you receive training?
  - b. When select Yes, a list of organizations that provide PN training appears.
  - c. When the training organization does not appear, select Add a new organization and “Logistics of Education” appears

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Contact Info
Demographics
Work Site Information
Education & Training <b>6</b>

Did you receive PN training?
<b>6b</b> Yes
Yes
No
Don't want to answer

<b>6b</b> Add a new organization <b>6c</b>
whanna beggood
Harold Freeman Institute
Wannabegood
PNTC

<b>6c</b> Organization Information
Contact Person
Description of Competencies
Format of Education/Training



# Patient Navigator (PN) – PN Education and Training

- d. Under the “Logistics of Education”, Fill in the training organization’s information, including the date(s) training session(s) were completed
- e. Select Contact Person for the training completed and add the information in the text box

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**Logistics of Education** **6d**

PN ID: 3 PN Name: Nancy Vernon  
Today's Date: Aug 22, 2022

**Organization Information**

**Contact Person** **6e**

**Description of Competencies**

**Format of Education/Training**

**Organization Information**

Name

**6d** Address

City State Zip

Phone Website

Email Other

Date training session/course completed

Date training session/course completed

Cancel Submit

**Contact information**

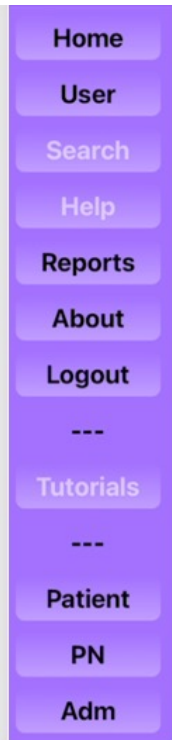
Mr. Ed **6e**

Cancel Submit



# Patient Navigator (PN) – PN Education and Training

- f. Under Logistics of Education, Select Description of Competencies.
- g. A list of domain names and competency statements appear as toggles



**Logistics of Education**

PN ID: 3 PN Name: Nancy Vernon  
Today's Date: Aug 22, 2022

**6f** Organization Information

Contact Person

**6f** Description of Competencies

Format of Education/Training

**6g**

Ethical, cultural, legal, and professional issues – process (how)

Competency: Demonstrate sensitivity and responsiveness to a diverse patient population, including but not limited to respecting confidentiality, organizational rules and regulations, ethical principles and diversity in gender, age, culture, race, ethnicity, religion, abilities, sexual orientation and geography.

Client and care team interaction - process (how)

Competency: Apply insight and understanding concerning human emotional responses to create and maintain positive interpersonal interactions leading to trust and collaboration between patient/client/family and the healthcare team. Patient safety and satisfaction is a priority.

Health Knowledge – content (what)

Competency: Demonstrates breadth of health, the cancer continuum, psychosocial and spiritual knowledge, attitudes and behaviors specific to their PN (clinical/licensed or non-medical licensure) role

Patient Care Coordination – process and content (how and what)

Cancel Submit



# Patient Navigator (PN) – PN Education and Training

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## 7. Select Format of Education / Training

- a. Select type of Education / Training and a list of types of education venues appear; Use toggle buttons to select

Online Instruction	<input type="checkbox"/>
In-person Instruction	<input type="checkbox"/>
Combination of online and In-person	<input checked="" type="checkbox"/>
Academic courses	<input checked="" type="checkbox"/>
Tailored Workshop	<input type="checkbox"/>
Other	<input type="checkbox"/>

7a

Cancel Submit

- Organization Information
- Contact Person
- Description of Competencies
- Format of Education/Training **7**

# Patient Navigator



**Outreach**



# PN Outreach

1. Outreach: activities or strategies to provide information and/or promote and recruit to the navigation program
  - a. Select Outreach
  - b. Select an existing event to edit or add new information, or
  - c. Select “Add a new event” to initiate information about a new event

The screenshot shows the 'Patient Navigator Home' page. At the top, it displays 'Patient Navigator Home', 'PN ID: 3', 'PN Name: NancyVernon', and 'Today's Date: Aug 25, 2022'. Below this are three yellow buttons: 'Characteristics', 'Outreach', and 'Dissemination'. The 'Outreach' button is highlighted with a black circle containing the number '1a'. The descriptions for each button are: 'Characteristics: Contact info, demographics, worksite information, education & PN training (including continuing education), competencies'; 'Outreach: Documentation of events where cancer information was presented: includes type of event / activity (cancer walk, education, oral presentation, etc.)'; and 'Dissemination: Media (print, internet, press conference, radio/tv interview), logistics, evaluation method and results'.

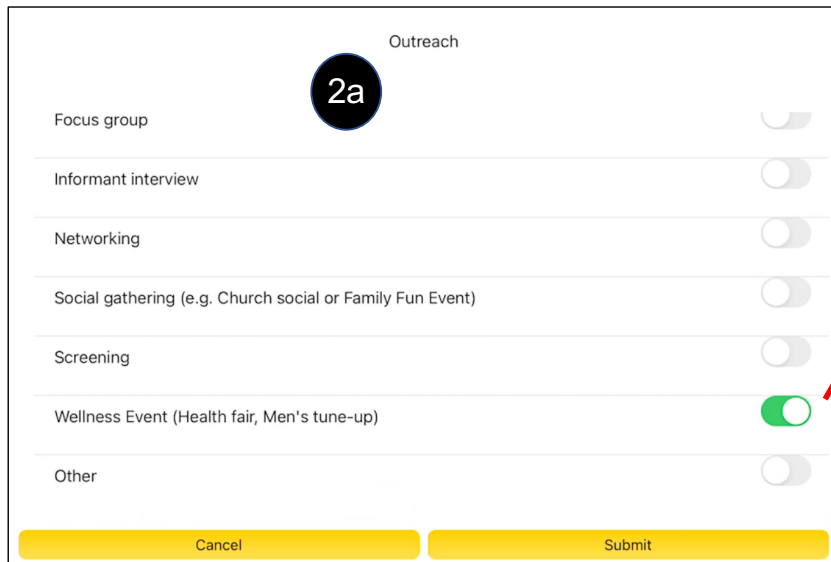
The screenshot shows the 'All outreaches' page. At the top, it displays 'All outreaches', 'PN ID: 3', 'PN Name: NancyVernon', and 'Today's Date: Aug 23, 2022'. Below this are three yellow buttons: 'Characteristics', 'Outreach', and 'Dissemination'. The 'Dissemination' button is highlighted with a black circle containing the number '1c'. Below the buttons is a table with columns 'Name', 'Start Date', and 'Type'. To the right of the table is a black circle containing the number '1b' and a yellow 'Add a new event' button. Below the table are four rows of outreach events, each with an 'Edit' button. The events are: 'Pow wow' (2018-03-22, Exhibit / information booth), 'Compadre breast s...' (2018-07-14, Exhibit / information booth), an unnamed event (2017-07-11, Exhibit / information booth), and 'Men's Health' (2018-07-19, Exhibit / information booth).

Name	Start Date	Type	Action
Pow wow	2018-03-22	Exhibit / information booth	Edit
Compadre breast s...	2018-07-14	Exhibit / information booth	Edit
	2017-07-11	Exhibit / information booth	Edit
Men's Health	2018-07-19	Exhibit / information booth	Edit

# PN Outreach

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2. Adding a new event,
  - a. The screen for types of Outreach events appears
  - b. Each selection appears as button allowing logistical details to be added
  - c. "Outreach logistic" screen appears
    - 1) Logistics will link to the subsequent option
      - a) When fill in Name, the Date option appears



Outreach

2a

Focus group

Informant interview

Networking

Social gathering (e.g. Church social or Family Fun Event)

Screening

Wellness Event (Health fair, Men's tune-up)

Other

Cancel Submit



Wellness Event (Health fair; Men's tune-up) 2b

Name of event

Date

Time slot

Length of activity

# of repeated sessions

Location

# of participants

Demographic of participants

# of contacts

Topics

Roles

Partner

Sponsor

Disseminate materials

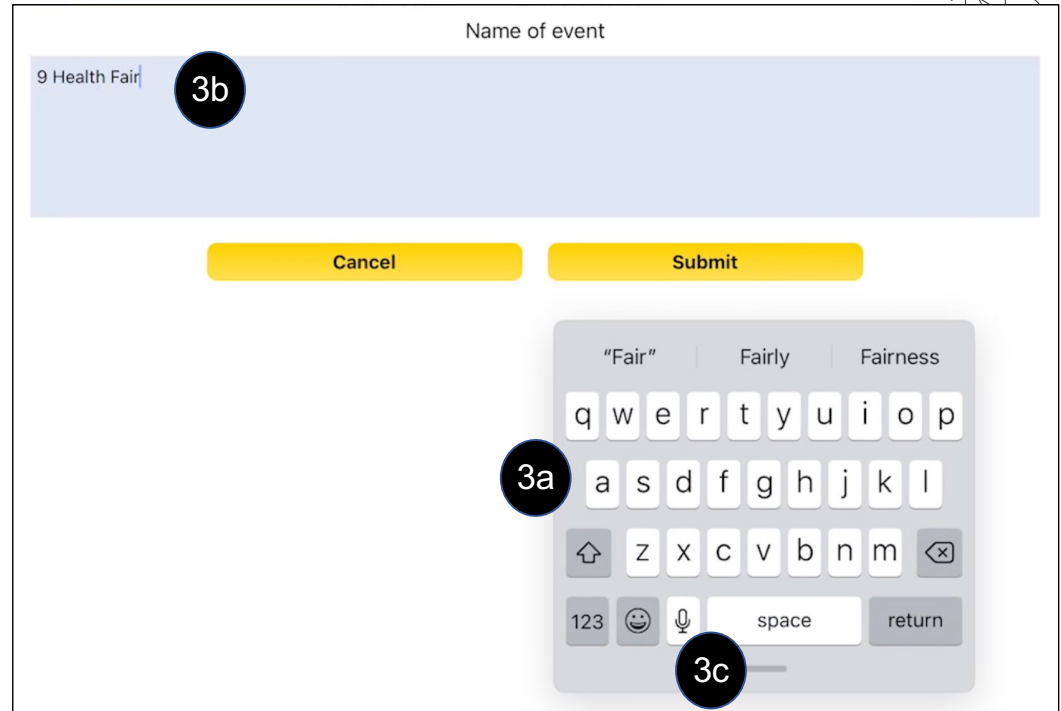
Fundraiser

2c

# PN Outreach

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3. Name the new event
  - a. Select on the text box and the keyboard appears
  - b. Type in the name of the event, or
  - c. Use the microphone to record the name of the event







# PN Outreach

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- Adm

## 4. Select Date

- a. Using the calendar roller bar, select the Start Date
- b. Select the End Date

4a

Select Start Date for the event

February	20	2016
March	21	2017
April	22	2018
May	23	2019
June	24	2020
July	25	2021
August	26	2022

Cancel Submit

4b

Select End Date for the event

February	22	2016
March	23	2017
April	24	2018
May	25	2019
June	26	2020
July	27	2021
August	28	2022

Cancel Submit



# PN Outreach

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## 5. Select Timeslot

a. Use the arrow for pull-down menu of options (including “other” at the bottom)

A screenshot of a web form titled "Select timeslot". It features a dropdown menu with a black circle containing the text "5a" overlaid on the left side. The dropdown is currently open, showing three options: "Weekday", "Weekend", and "Friday, Saturday, Sunday". The text "Please select an option" is visible at the top of the dropdown, and a small upward-pointing arrow is on the right side of the dropdown box.

Select timeslot

Please select an option

Weekday

Weekend

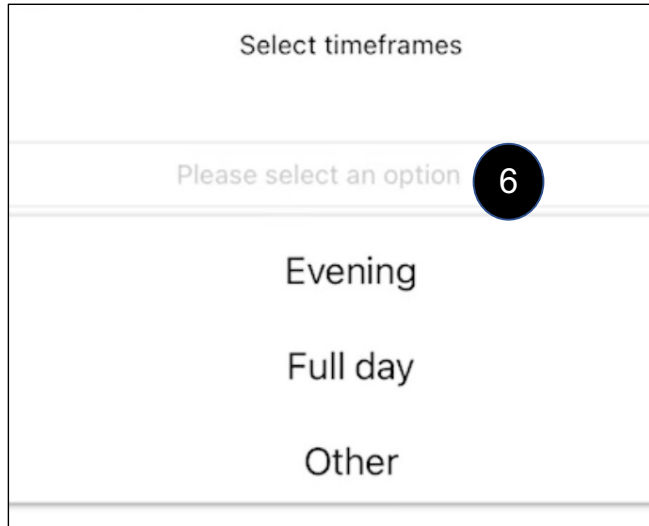
Friday, Saturday, Sunday

# PN Outreach

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## 6. Select timeframe

- Use the arrow for pull-down menu (including “other” at the bottom)
- When “other” is selected, a text box appears, and the keyboard appears; type in or record the response



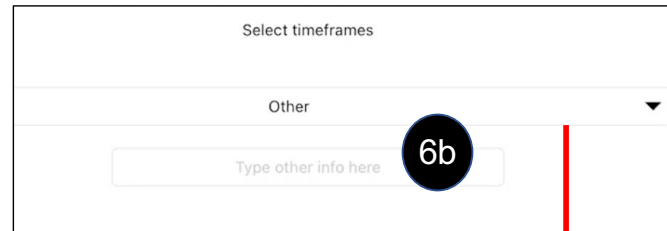
Select timeframes

Please select an option **6**

Evening

Full day

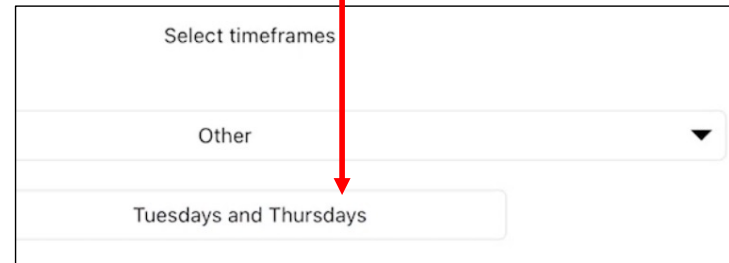
Other



Select timeframes

Other

Type other info here **6b**



Select timeframes

Other

Tuesdays and Thursdays



# PN Outreach

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7. Select Length of activity
  - a. Use the arrow for pull-down menu (including “other” at the bottom)
  - b. When “other” is selected, a text box appears, and the keyboard appears; type in or record the response
8. During some events, activities (workshops or in-person demonstrations) occur. When such events are repeated, use the arrow to pull-down options
  - a. If no activities were repeated, skip this option and go to the next logistic

Length of activity
Please select an option
<1 hour
1-3 hours
Half day
Full day
Other

7

# of repeated session
Please select an option
3
4
5
Other

8

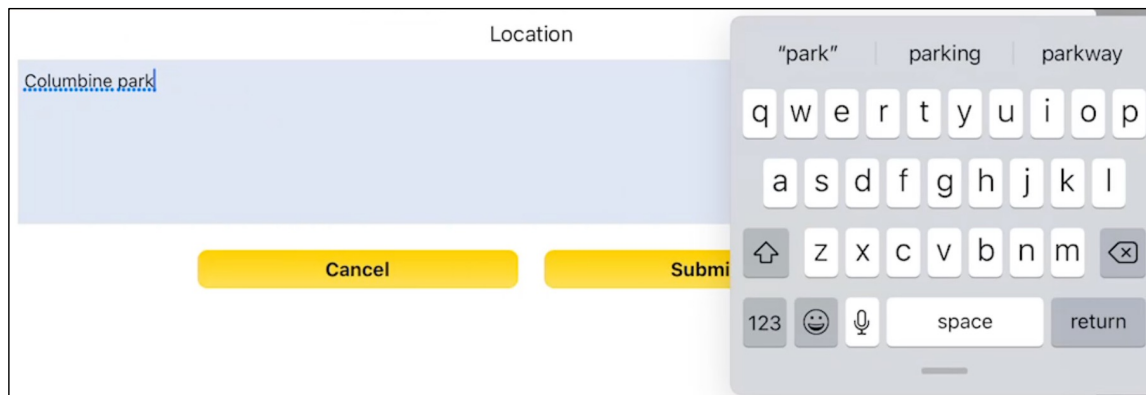


# PN Outreach

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## 9. Location

- Select on the text box and keyboard appears. Type or record the name of the location





# PN Outreach

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## 10. Number of participants

- a. Select the number of participants attending the event
- b. When the numbers are not shared, make an estimate

# of participant(may be approximate)
Please select an option
25
26
27



# PN Outreach

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## 11. Demographics of participants

- a. Select each racial group
- b. Each group selected will ask for an estimate of how many of each racial group are Hispanic or Latino, by gender

Demographic of participants

PN ID: 3 PN Name: NancyVernon  
Today's Date: Aug 23, 2022

**11**

- American Indian/ Alaska Native
- Asian
- Native Hawaiian or Other Pacific Islands
- Black or African American
- White
- More than one race
- Unknown or not reported

**American Indian/ Alaska Native**

- 11b** Non-Hispanic or Latino
- Hispanic or Latino

**White**

- Non-Hispanic or Latino
- Hispanic or Latino

**Hispanic Female** **11b**

Please select an option

- 16
- 17
- 18
- 19



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## 12. Number of contacts

- a. Select the number of participants with whom the PN / user collected follow-up contact information

## 13. Topics

- a. Touch the text box for keyboard to appear. Either type or record a list of topics addressed during the event

# of contacts
Please select an option
12
13
14

Topic

Chemotherapy side effects

13

Cancel Submit

"effects" email end

q w e r t y u i o p

a s d f g h j k l

z x c v b n m

123 space return



# PN Outreach

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## 14. Role(s)

a. Select each role played by the PN / user

## 15. Partner

- a. When “yes” is selected
- b. Select the partner. If not on the list, select “other” and add the name



# PN Outreach

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## 16. Sponsor

- a. Select “Yes” if the event had a sponsor / funder
- b. If the name(s) appear(s), select the toggle
- c. If the sponsor’s name does not appear, select “Other”

16 Was there any sponsor?

Please select an option

16a Yes

No

Select name of sponsors

American Cancer Society

Avon

National Institutes of Health

Susan G. Komen for the Cure®

Other

Type here

Cancel Submit

16b

Select name of sponsors

American Cancer Society

Avon

National Institutes of Health

Susan G. Komen for the Cure®

Other

CDC

Cancel Submit

16c



# PN Outreach

17. Were materials (brochures, fliers) disseminated during the event?

a. When “Yes” is selected, two options appear:

- 1) Select the number of different items disseminated
- 2) Using toggle buttons, select the type(s) of materials
- 3) For each type selected, options for details appear; select, type or record the requested information

Number of material

17a1)	9
	7
	8
	9

Type of materials

Brochure	<input checked="" type="checkbox"/>	17a2)
Fact / information sheet	<input type="checkbox"/>	
Give-away (pens, key chains, etc.)	<input checked="" type="checkbox"/>	
Magazine/journal article	<input type="checkbox"/>	
Website	<input type="checkbox"/>	
Social media (facebook, twitter)	<input type="checkbox"/>	
Other	<input type="checkbox"/>	

Cancel Submit

17

Was there any material disseminated?

Yes

17a Yes ✓

No

Number of different materials

Type of materials

17a3) Brochure → Name

Give-away (pens; key chains; etc.)

# of units 17a3)

Source of material

Author

# PN Outreach



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18. Select the button if any fundraiser activities occurred during the event (e.g., raffle, silent auction); select “yes”
  - a. Type or record the fundraising activities

Fundraisers

Two raffles for large prizes (tickets to a Broncos game and holiday weekend at the Broadmoor) were held and a blanket dance for cancer survivors

Cancel Submit

“priz” prizes prize

q w e r t y u i o p

a s d f g h j k l

↑ z x c v b n m ↵

123 😊 🗣️ space return

Was there any fundraiser?

Yes **18**

# PN Outreach

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## 19. Evaluation

- a. When “Yes” is selected, a series of evaluation details appears
- b. Select the buttons to add details
- c. Select “Other Evaluation” to clarify additional evaluation strategies

Was the activity evaluated?

Yes

Yes

No

19b

Number of participants taking pretest
% of correct knowledge responses in pretest
Number of participants taking post test
% of correct knowledge responses in posttest
% of increase in knowledge: pre- to post
Other Evaluation

19c

Other Evaluation

Other Evaluation

Cancel
Submit



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## 20. Event Outcome

- a. When “Yes” is selected, a list of outcomes
- b. Using toggle buttons, select outcomes
- c. Each selected outcome appears on the next screen

Change in behavior (exercise, smoking, substance use)	<input type="checkbox"/>
Increased awareness	<input type="checkbox"/>
Increased knowledge	<input checked="" type="checkbox"/>
# referred to HCP or HC setting	<input checked="" type="checkbox"/>
# referred to screening	<input checked="" type="checkbox"/>
# with screening appointments	<input type="checkbox"/>
# materials given out	<input type="checkbox"/>

20a

Cancel Submit

20b

# referred to screening

# referred to HCP or HC setting

20c

# referred to screening

Please select an option

8

9

10

Was there any activity outcome?

Please select an option

20

Yes

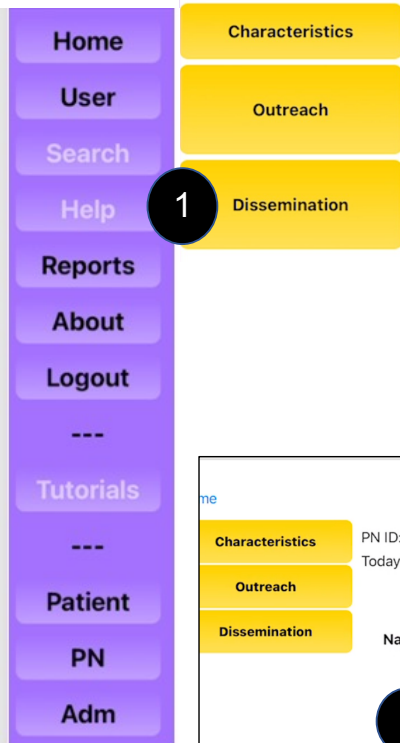
No

# Patient Navigator

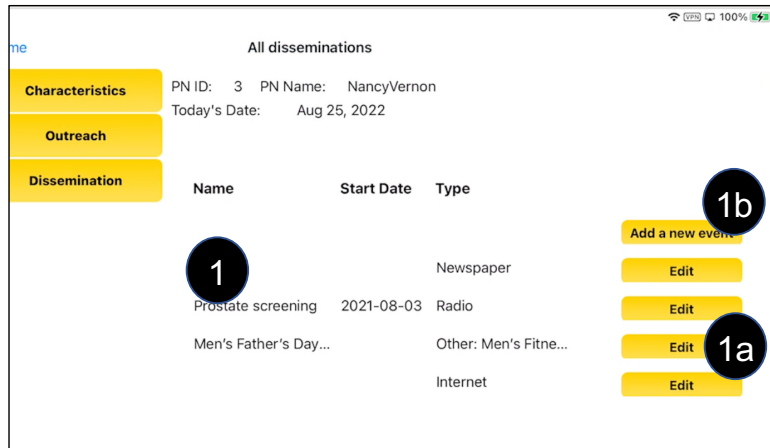


**Dissemination**

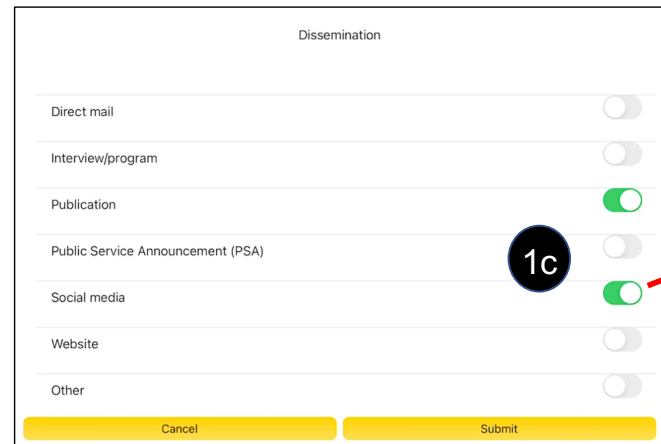
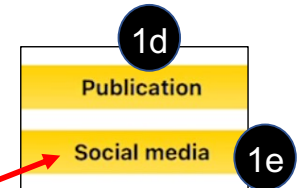
# PN Dissemination



1. Select Dissemination and the screen shows previous dissemination activities
  - a. Select “Edit” to add or modify information to a specific strategy
  - b. Select “Add a new event” for a strategy not appearing on the list
  - c. Use Toggle buttons to select dissemination strategy/ies
  - d. The selected strategies appear on the screen



Name	Start Date	Type
		Newspaper
Prostate screening	2021-08-03	Radio
Men's Father's Day...		Other: Men's Fitne...
		Internet



# PN Dissemination

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- Characteristics
- Outreach
- Dissemination

2. The Media source screen appears

- Use toggle buttons to identify each type of media to be used
- Those choices show up on the next screen. Select one.
- Dissemination Logistics options appear

Media source

2

Internet	<input type="checkbox"/>
Newspaper	<input type="checkbox"/>
Magazine/Journal	<input checked="" type="checkbox"/>
Outdoor/Transit	<input type="checkbox"/>
Radio	<input checked="" type="checkbox"/>
TV	<input type="checkbox"/>
Other	<input type="checkbox"/>

Cancel Submit

Magazine/Journal

Radio

Topic

Time Frame

Location

Roles

Partners

Sponsors

Fundraiser

Disseminate Materials

Media evaluated



# PN Dissemination

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Characteristics  
Outreach  
Dissemination

3 Topic  
Time Frame  
Location  
Roles  
Partners  
Sponsors  
Fundraiser  
Disseminate Materials  
Media evaluated

## 3. Select "Topic"

- a. For each option, type or record the details of the dissemination activity
- b. "Name" refers to the entire activity, such as "Denver 9 Health Fair", whereas "Topic Title" refers to a specific segment within the entire Health Fair

3a

Name
Subject
Title

Topic Name 3b

Denver 9 Health Fair

Cancel Submit

Topic Subject

Prostate health

Cancel Submit

"health" healthy alth&Medical

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123 space return

Topic Title 3b

New medication break-throughs for metastatic prostate cancer

Cancel Submit

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## 4. Select "Time Frame"

- a. The "Dissemination Logistic: Time Frame" screen appears
- b. Select the start date from the rolling calendar
- c. Type or record the exact time
- d. Use toggle buttons to select specific time slots (2 screens)
- e. Use toggle buttons to select duration (2 screens)

- Topic
- 4** Time Frame
- Location
- Roles
- Partners
- Sponsors
- Fundraiser
- Disseminate Materials
- Media evaluated

**4a**

Date

Time

Time Slot

Duration

Select Date

February	18	2012
March	19	2013
April	20	2014
May	21	2015
June	22	2016
July	23	2017
August	24	2018

Cancel Submit

Duration

Minutes

Hours

Days

Weeks/ Months

Continuous

Other

**4b**

Weeks/ Months

Please select an option

One week

One month

**4e**

Write exact time

3:15 pm to 5:30 pm

Cancel Submit

"pm" PN pneumonia

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**4c**

Time slot

Daily

Weekday

Weekend

**4d**

Time slot

Morning

Afternoon

Evening

Overnight

**4d**



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## 5. Select "Location"

- Type or record the physical address or name (e.g., Mile High Stadium)
- Location may also be a radio station or website or blog
- "Location" is not always appropriate when tracking dissemination strategies

Topic
Time Frame
<b>5</b> Location
Roles
Partners
Sponsors
Fundraiser
Disseminate Materials
Media evaluated

Location

Please select an option

Write in

Not applicable

Location Details

30 second announcements between plays during Broncos game

Cancel Submit

and in at

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## 6. Select "Roles"

a. Use toggle buttons to select roles

- Topic
- Time Frame
- Location
- 6** Roles
- Partners
- Sponsors
- Fundraiser
- Disseminate Materials
- Media evaluated

Roles

Author	<input type="checkbox"/>
Coordinator / Organizer	<input type="checkbox"/>
Contributor	<input type="checkbox"/>
Presenter / Speaker	<input checked="" type="checkbox"/>
Submitter / Poster	<input type="checkbox"/>
Other	<input type="checkbox"/>

Cancel Submit



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- Topic
- Time Frame
- Location
- Roles
- Partners
- 7** Sponsors
- Fundraiser
- Disseminate Materials
- Media evaluated

7. Select “Sponsor(s)”, then “yes”, if there was a sponsor for the dissemination activity

a. Use toggle buttons to name the partner; if not showing, select “Other” and enter the name

Was there any sponsor?

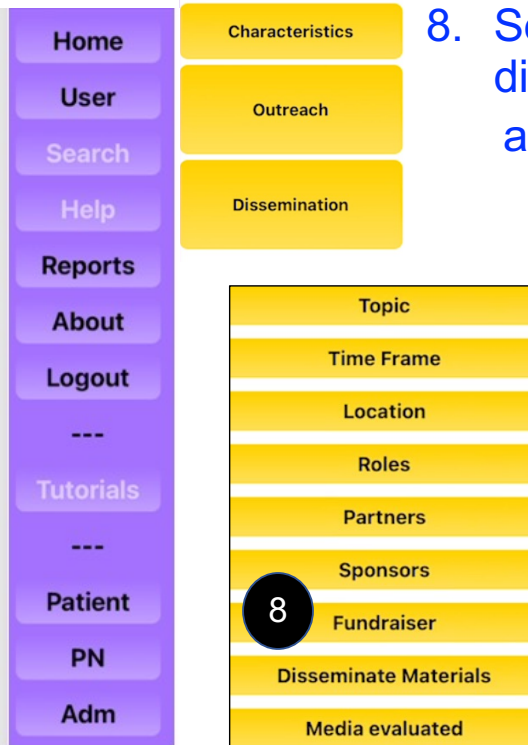
**7**

Yes

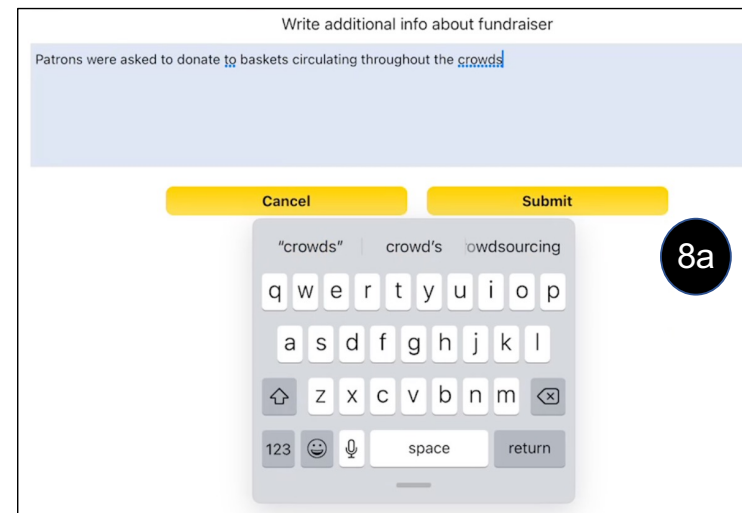
Select name of sponsors

American Cancer Society	<input type="checkbox"/>
Avon	<input type="checkbox"/>
National Institutes of Health	<b>7a</b> <input checked="" type="checkbox"/>
Susan G. Komen for the Cure®	<input type="checkbox"/>
Other	<input type="checkbox"/>

# PN Dissemination



8. Select “Fundraiser(s)”, then “yes”, if there was fundraising specific to the dissemination activity
  - a. Type or record information about the fundraiser

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9. Select “Disseminate Material”, then “yes”, if there were any materials disseminated

a. Select the numbers of products disseminated

b. Each item is listed; select one and the Material Info screen appears

Topic
Time Frame
Location
Roles
Partners
Sponsors
Fundraiser
9 Disseminate Materials
Media evaluated

Were any materials disseminated?

Yes

Yes **9**

No

Select number of products

3

2

3 **9a**

1

**9b**

Item 1
Item 2
Item 3

→

**9b**

Type of product
Name
# of units
Source of material
Author





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## 9. "Disseminate Material" (continued)

c. Select "Type of Product"

d. Use toggle buttons to select the type or "other" if it is not listed

e. The next screen is to name the product, such as a "NACR organization description"

9c Type of product

Name 9e

# of units

Source of material

Author

Type of product

Booklet

Brochure

Fact / information sheet 9d

Give-away (pens, key chains, etc.)

Magazine/journal article

Other

Cancel Submit

Name

NACR organization description brochure 9e

Cancel Submit



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Type of product  
Name  
# of units  
Source of material  
Author

## 9. "Disseminate Material" (continued)

- f. Select "Number of units" or copies that were disseminated
- g. Select "Source of material", such as if the brochures were provided from the American Cancer Society or another organization
- h. Select "Author" to identify who created the products

Number of units
106
104
105
106

Source of material

Northwest Portland Area Indian Health Board

9g

Cancel Submit

"Board" Boarding Boards

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Author

Created by your program  9h

Created by another program or organization

Other



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## 10. Select “Media evaluated”

- Select “Yes” if it was evaluated
- The next screen is options of media outcomes
- Select outcomes relevant to the type of media used for dissemination and respond to the questions

- Topic
- Time Frame
- Location
- Roles
- Partners
- Sponsors
- Fundraiser
- Disseminate Materials
- 10** Media evaluated

Was media evaluated?

Yes

**Yes**

No

- Increased Participation
- Media reach/circulation
- Number of hits/views
- Radio/TV ratings/reach
- Length on site
- Number of followers
- Number of retweets
- Other
- Comments

Increased Participation

Had 40 more participants than last year almost all signed up for prostate screening

Cancel Submit

“screening” screenings screening’s

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# Help



1. Contact [help.naci@gmail.com](mailto:help.naci@gmail.com) to obtain help when using the PN component within NACI Care™

