NACI Care™:

A Patient Navigation Data Entry, Tracking and Evaluation Program

Tutorial NACI Care™ Entering PN/User Information and Tasks
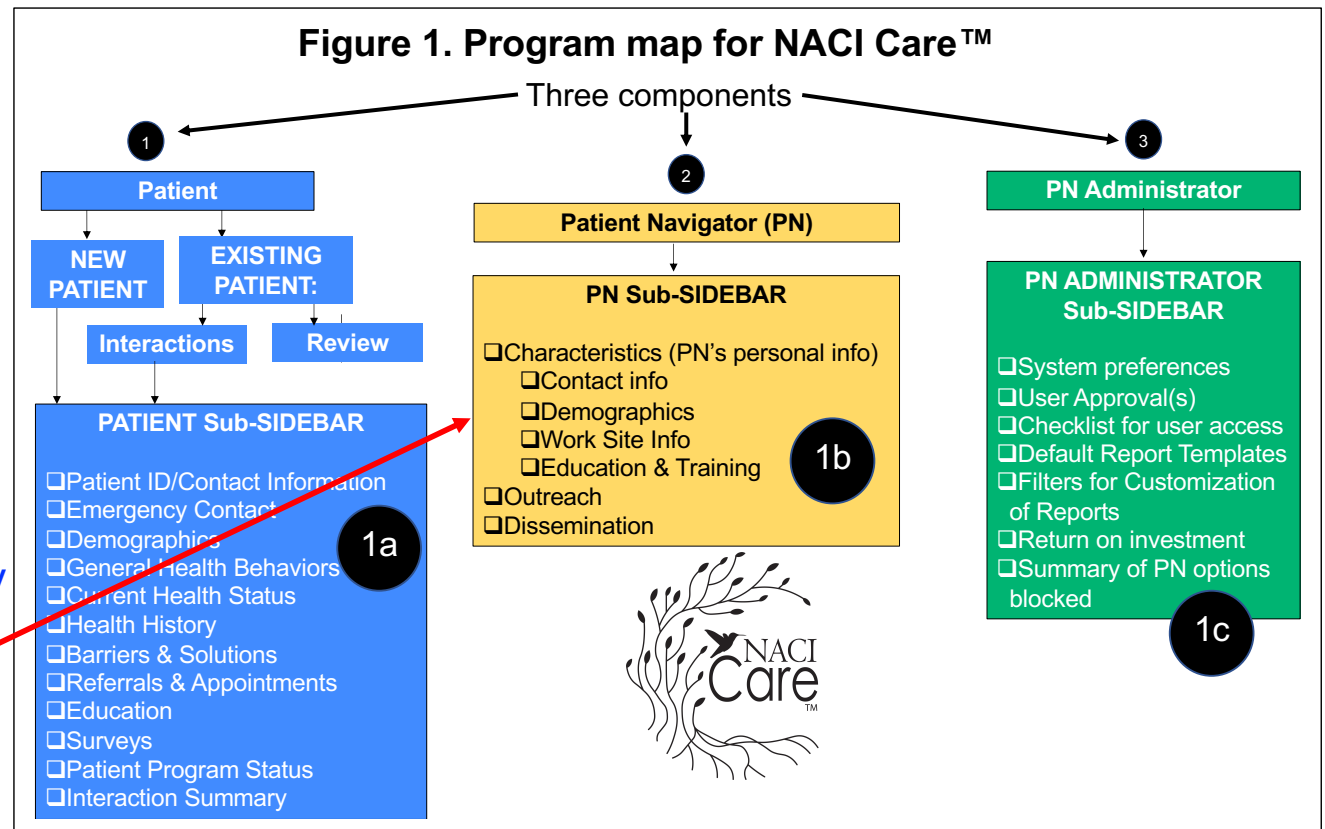
August 29, 2022

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

Figure 1. Program map for NACI Care™

Three components

1 Patient

NEW PATIENT   **EXISTING PATIENT:**

Interactions   Review

PATIENT Sub-SIDEBAR

❑Patient ID/Contact Information
❑Emergency Contact
❑Demographics
❑General Health Behaviors
❑Current Health Status
❑Health History
❑Barriers & Solutions
❑Referrals & Appointments
❑Education
❑Surveys
❑Patient Program Status
❑Interaction Summary

1a

2 Patient Navigator (PN)

PN Sub-SIDEBAR

❑Characteristics (PN's personal info)
 ❑Contact info
 ❑Demographics
 ❑Work Site Info
 ❑Education & Training
❑Outreach
❑Dissemination

1b

3 PN Administrator

PN ADMINISTRATOR Sub-SIDEBAR

❑System preferences
❑User Approval(s)
❑Checklist for user access
❑Default Report Templates
❑Filters for Customization of Reports
❑Return on investment
❑Summary of PN options blocked

1c

Patient Navigator (PN) – Home screen

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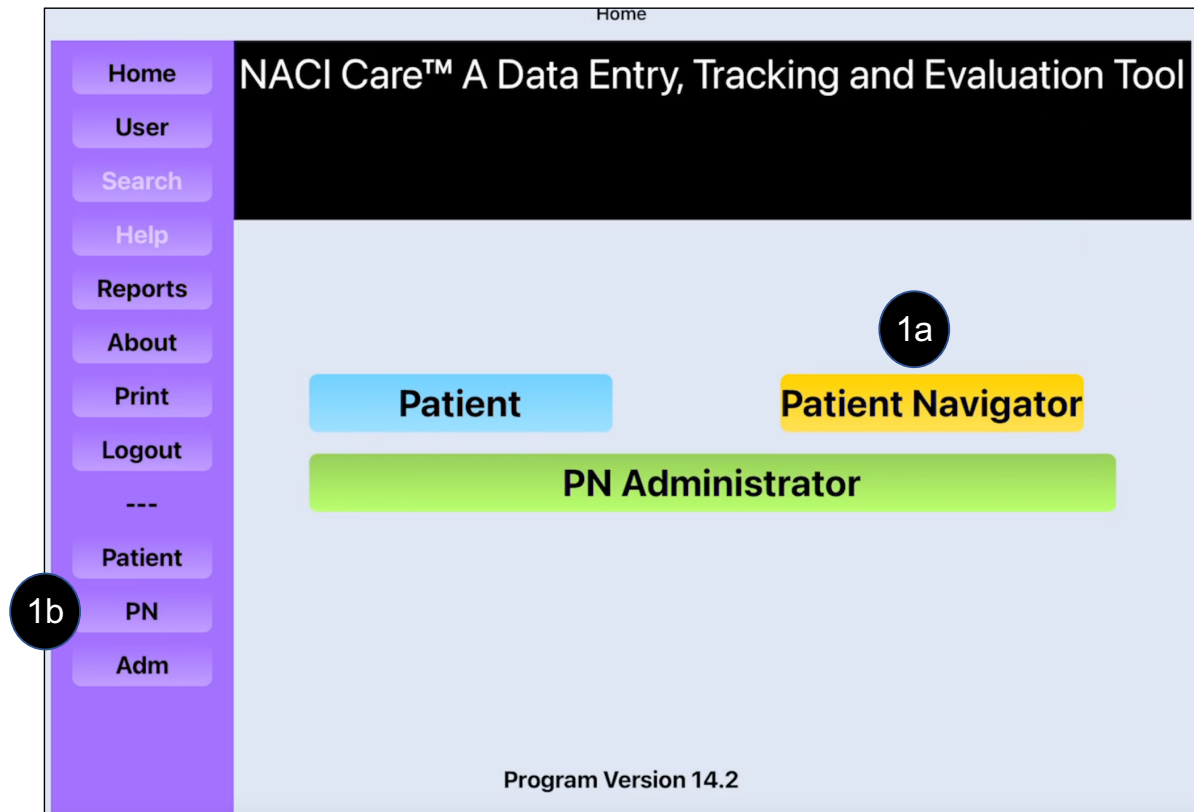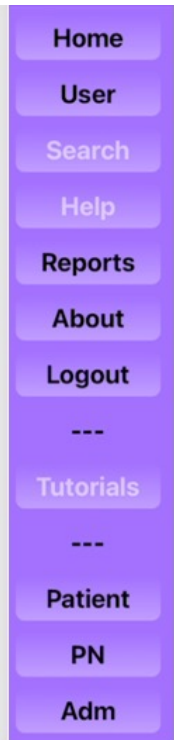
Patient Navigator Characteristics

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

Sidebar buttons:
- Home
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- ---
- Tutorials
- ---
- Patient
- PN
- Adm

2a

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.)
Dissemination	Media (print, internet, press conference, radio/tv interview), logistics, evaluation method and results
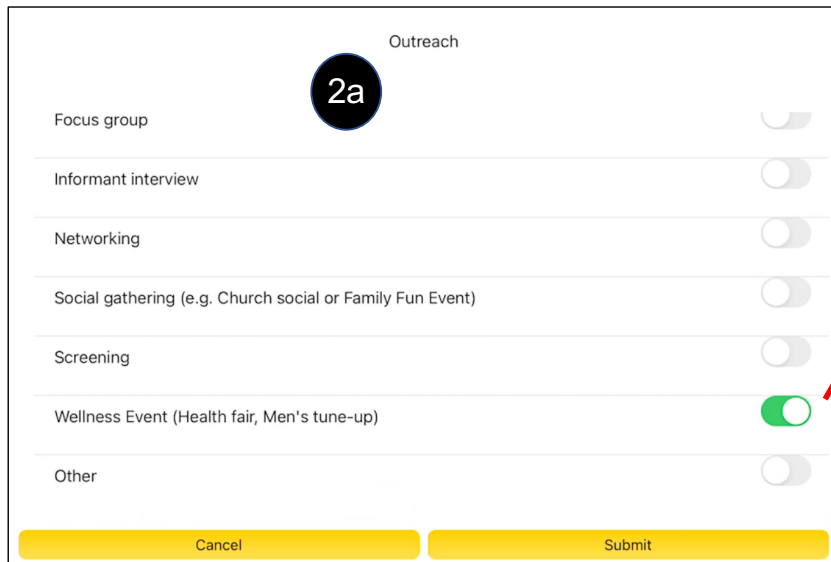
2b

Summary of PN options blocked

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

Excluded

Demographics

Gender

Literacy & Learning

Physical Conditions

Medical Care

Religion

Included

Demographics

Birth Date

Sexual Orientation

Race & Ethnicity

Height/Weight

Language

Health Insurance

Education

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

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.

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

(4)
- Contact Info
- Demographics
- Work Site Information
- Education & Training

(4a)
- Date of Birth
- Gender
- Sexual Orientation
- Race & Ethnicity
- Religion
- Education

(4a1)

Sexual Orientation?

What is your sexual orientation?

Lesbian ▲

- Heterosexual
- Gay
- Lesbian
- Bisexual
- Questioning

Cancel   Submit

Patient Navigator (PN) – PN Worksite

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

Patient Navigator (PN) – PN Education and Training

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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

Did you receive training?

Menu (6):
- Contact Info
- Demographics
- Work Site Information
- Education & Training

Did you receive PN training? (6b)
- Yes
  - Yes
  - No
  - Don't want to answer

Organization list (6c / 6b):
- Add a new organization
- whanna beggood
- Harold Freeman Institute
- Wannabegood
- PNTC

Logistics of Education (6c):
- 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

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

Patient Navigator (PN) – PN Education and Training

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

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Organization Information

Contact Person

Description of Competencies

Format of Education/Training — 7

Online Instruction

In-person Instruction

Combination of online and In-person — 7a

Academic courses

Tailored Workshop

Other

Cancel   Submit

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

PN Outreach

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

Sidebar navigation: Home | User | Search | Help | Reports | About | Logout | --- | Tutorials | --- | Patient | PN | Adm

2a — Outreach

Focus group	(off)
Informant interview	(off)
Networking	(off)
Social gathering (e.g. Church social or Family Fun Event)	(off)
Screening	(off)
Wellness Event (Health fair, Men's tune-up)	(on)
Other	(off)

Cancel | Submit

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

2c
- Name of event
- Date
- Time slot
- Length of activity
- # of repeated sessions
- Location
- # of participants
- Demographic of participants
- # of contacts
- Topics
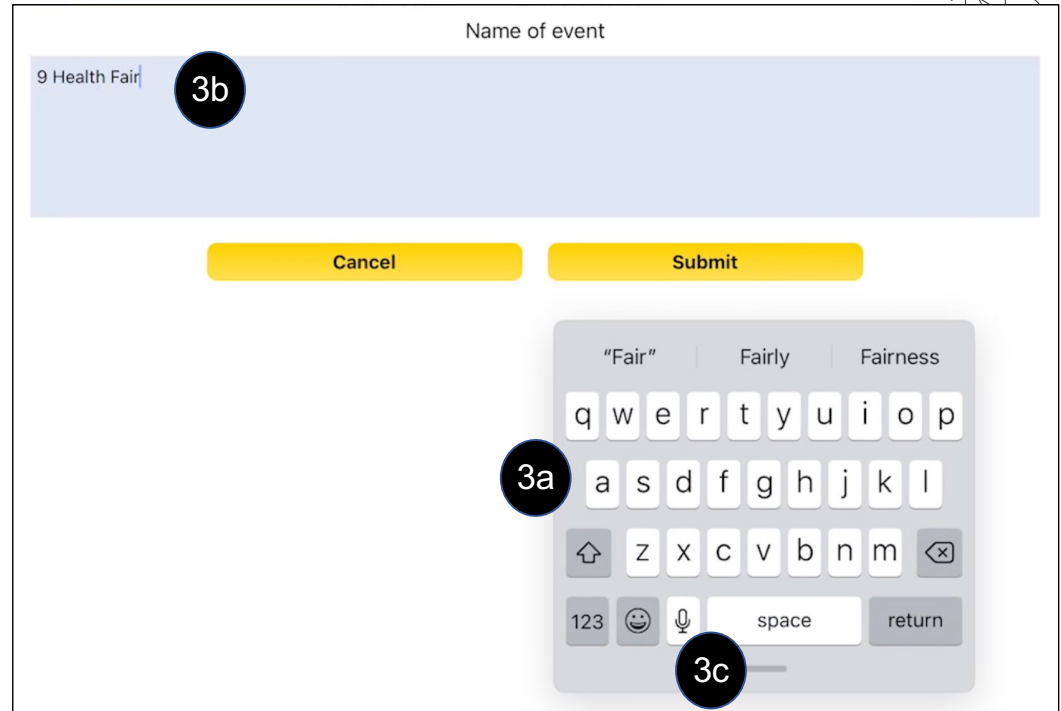- Roles
- Partner
- Sponsor
- Disseminate materials
- Fundraiser

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

Name of event

9 Health Fair | 3b

Cancel   Submit

"Fair"   Fairly   Fairness

q w e r t y u i o p
3a a s d f g h j k l
⇧ z x c v b n m ⌫
123 ☺ 🎤 space return
3c

PN Outreach

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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

5. Select Timeslot

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

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PN Outreach

6. Select timeframe
   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
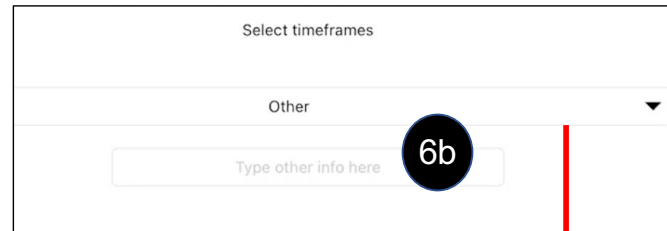
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Select timeframes

Please select an option   **6**

Evening

Full day
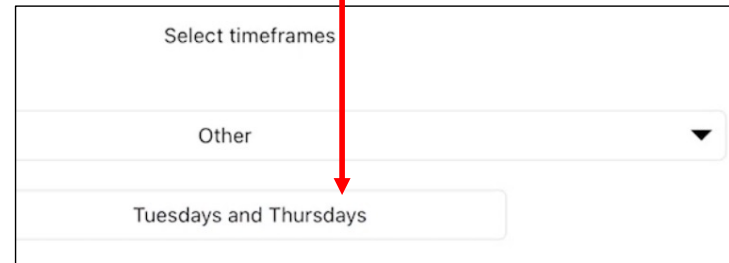
Other

Select timeframes

Other   ▼

6b   Type other info here

Select timeframes

Other   ▼

Tuesdays and Thursdays

PN Outreach

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

7

Please select an option

<1 hour

1-3 hours

Half day

Full day

Other

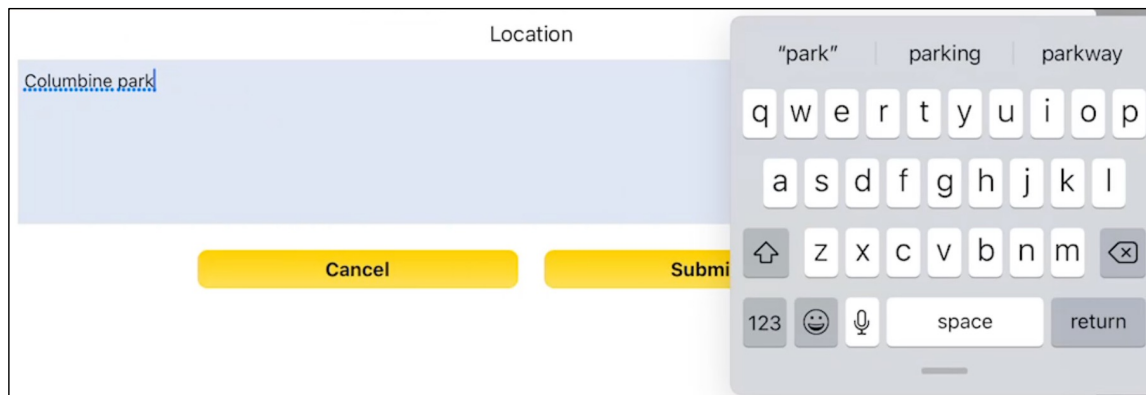**8**

# of repeated session

Please select an option

4

5

Other

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PN Outreach

9. Location

    a. 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

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

PN Outreach

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

PN Outreach

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

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15 Was there any partner?

Please select an option

15a Yes

No

Roles **14**

Coordinator/organizer

Facilitator

Staffing a booth / exhibit

Set products on a table for participants to take

Speaker / Presenter

Other

Cancel   Submit

Select name of partners

American Cancer Society

Avon

National Institutes of Health

Susan G. Komen for the Cure®

Other   **15b**

Cancel   Submit

Select name of partners

American Cancer Society

Avon

National Institutes of Health

Susan G. Komen for the Cure®

Other

Native American Cancer Research Corporation

Cancel   Submit

PN Outreach

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

16b

Susan G. Komen for the Cure®

Other

Type here

Cancel   Submit

Select name of sponsors

"CDC"

American Cancer Society

Avon

National Institutes of Health

Susan G. Komen for the Cure®

Other

CDC **16c**

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

Cancel   Submit

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

PN Outreach

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

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PN Outreach

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

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19 — 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

PN Outreach

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

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20

Was there any activity outcome?

Please select an option

Yes

No

20a

Change in behavior (exercise, smoking, substance use)	⬜
Increased awareness	⬜
Increased knowledge	✅
# referred to HCP or HC setting	✅
# referred to screening	✅
# with screening appointments	⬜
# materials given out	⬜

Cancel   Submit

20b

referred to screening

referred to HCP or HC setting

20c

referred to screening

Please select an option

8

9

10
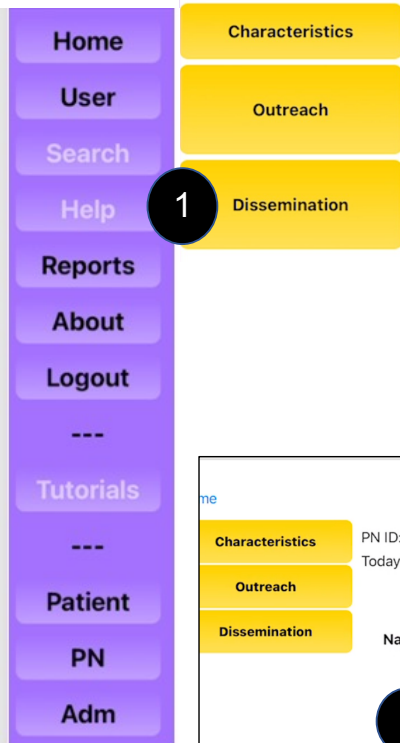
Patient Navigator
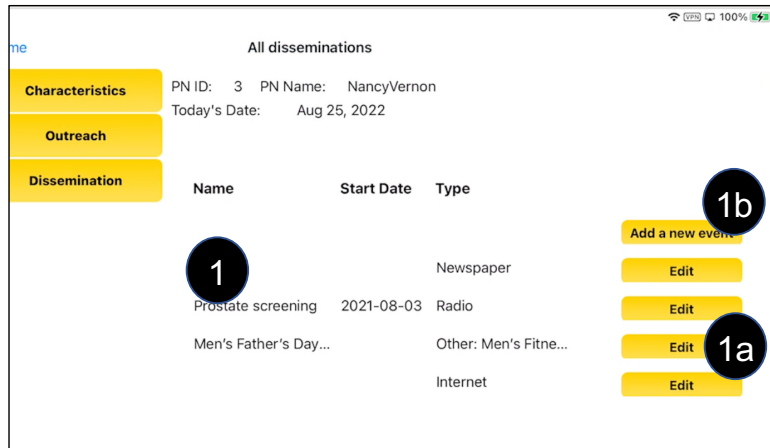
Dissemination
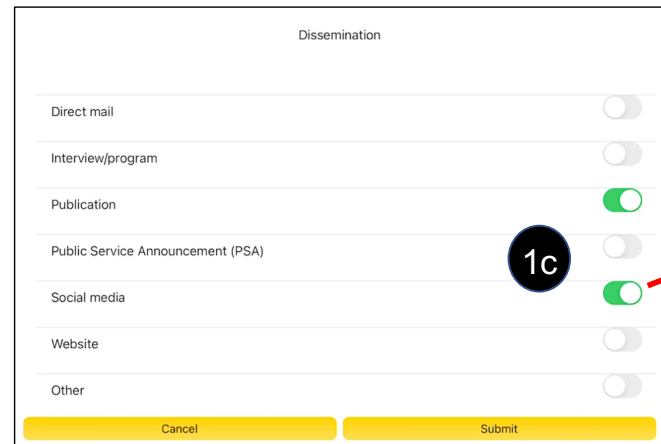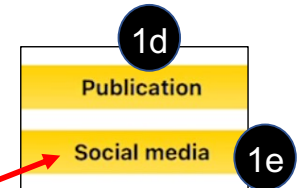
PN Dissemination

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

PN Dissemination

2. The Media source screen appears
   a. Use toggle buttons to identify each type of media to be used
   b. Those choices show up on the next screen. Select one.
   c. Dissemination Logistics options appear

PN Dissemination

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

3 Topic

Time Frame

Location

Roles

Partners

Sponsors

Fundraiser

Disseminate Materials

Media evaluated

3a Name / Subject / Title

3b Topic Name — Denver 9 Health Fair — Cancel / Submit

Topic Subject — Prostate health — Cancel / Submit

3b Topic Title — New medication break-throughs for metastatic prostate cancer — Cancel / Submit

PN Dissemination

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)

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PN Dissemination

5. Select "Location"

    a. Type or record the physical address or name (e.g., Mile High Stadium)

    b. Location may also be a radio station or website or blog

    c. "Location" is not always appropriate when tracking dissemination strategies

Sidebar menu: Home, User, Search, Help, Reports, About, Logout, ---, Tutorials, ---, Patient, PN, Adm

Top buttons: Characteristics, Outreach, Dissemination

List: Topic, Time Frame, Location (5), 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

PN Dissemination

6. Select "Roles"

    a. Use toggle buttons to select roles

PN Dissemination

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Characteristics
Outreach
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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
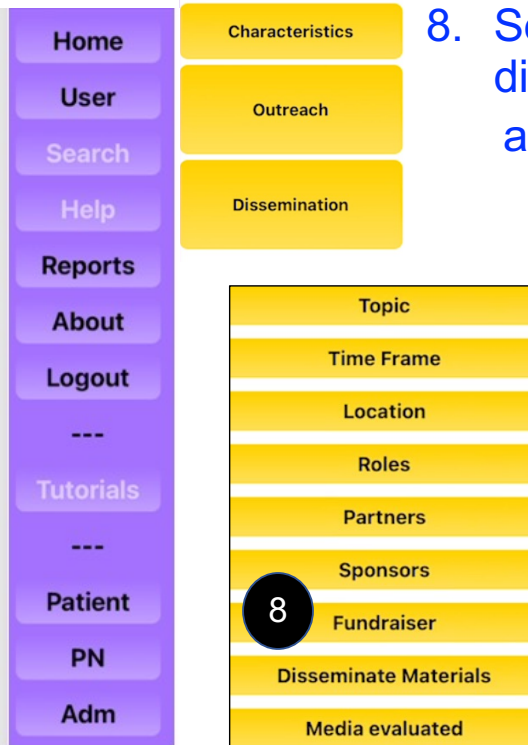
Was there any sponsor?
(7)
Yes
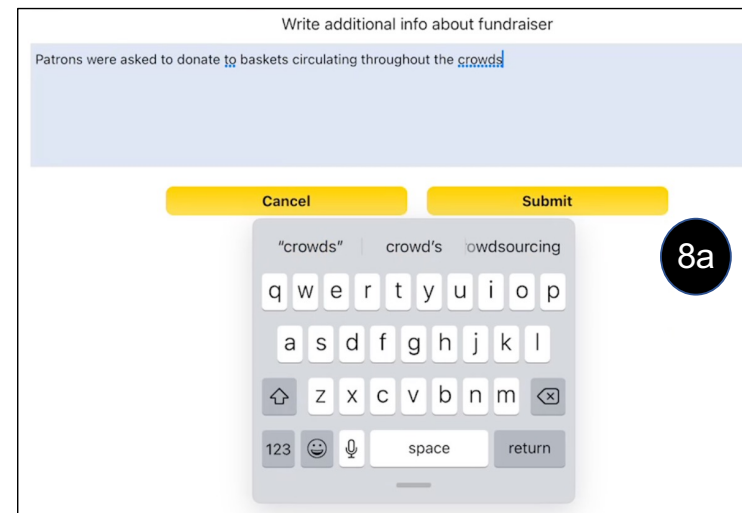
Select name of sponsors

American Cancer Society

Avon

National Institutes of Health **(7a)**

Susan G. Komen for the Cure®

Other

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

PN Dissemination

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

PN Dissemination

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 a "NACR organization description"

PN Dissemination

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

PN Dissemination

10. Select "Media evaluated"

   a. Select "Yes" if it was evaluated

   b. The next screen is options of media outcomes

   c. Select outcomes relevant to the type of media used for dissemination and respond to the questions

Help

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1. Contact help.naci@gmail.com to obtain help when using the PN component within NACI Care™