



NACI Care©:

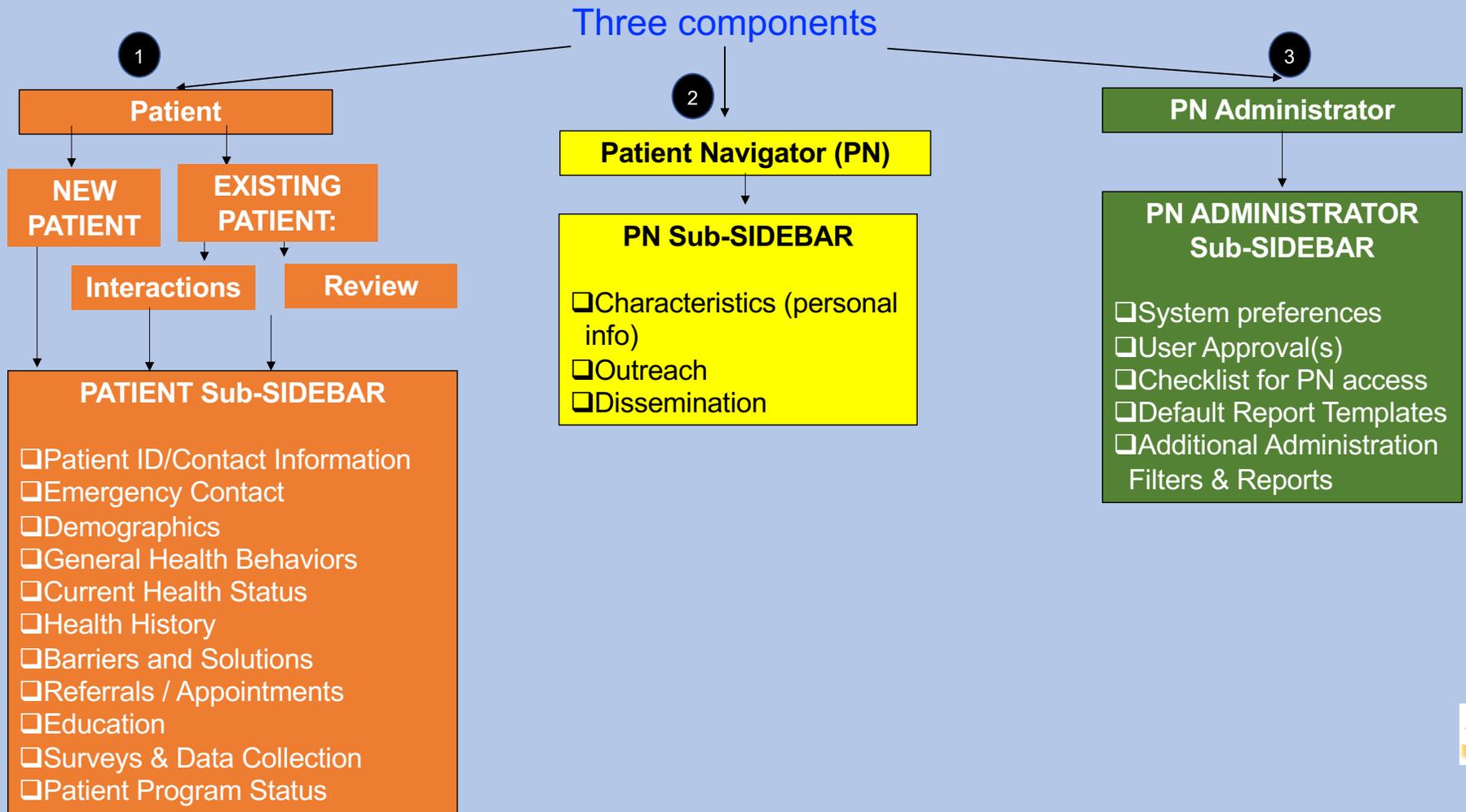
A Tool to Document and Evaluate Patient Navigation

Tutorial – New or Existing Patient Information

Brief Overview of 3 Components of NACI Care©



Figure 1. Program map for NACI Care©



New Patient

Entering ID and Contact Information

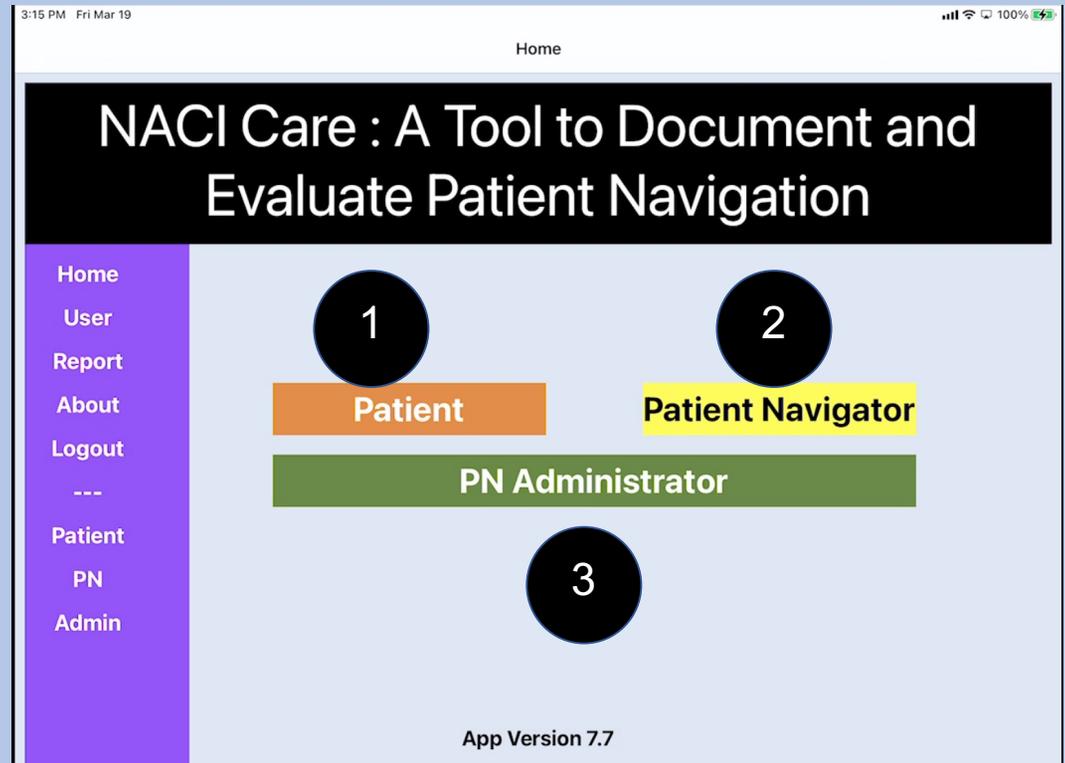


What's in the NACI Care© Home?

The Home screen allows the user to go to the desired component

1. Patient
2. Patient Navigator
3. Navigation (PN) Administrator

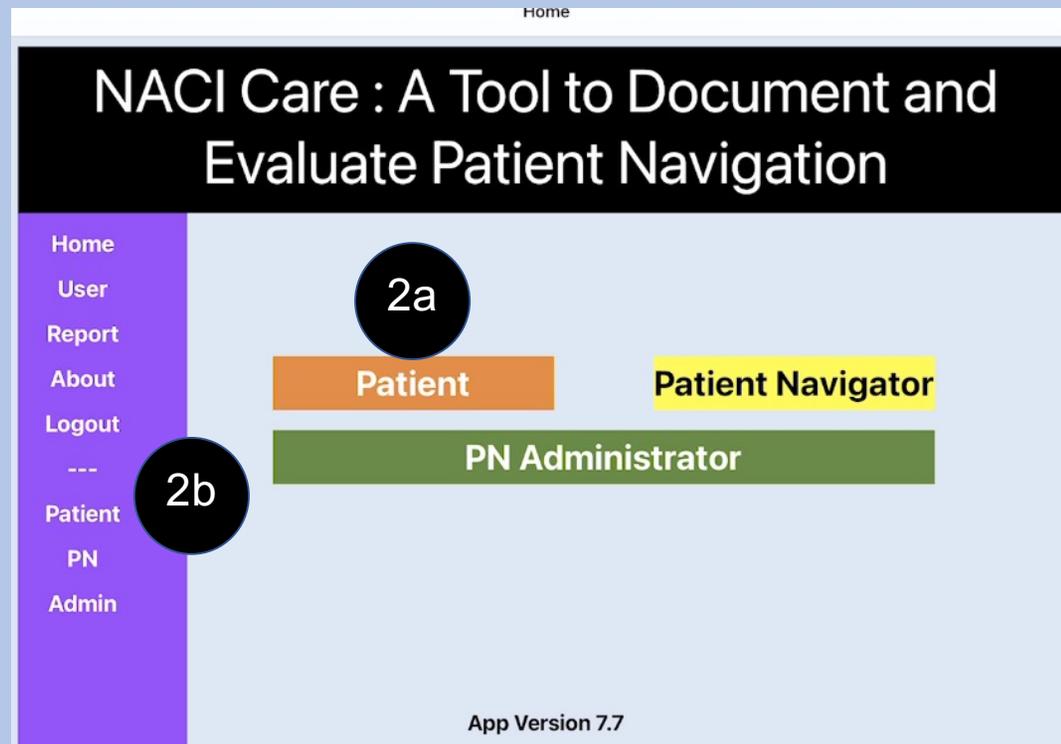
NOTE: “Patient” refers to individuals with whom the PN is helping. They may be healthy individuals without any significant health problems who are taking part in screening or other prevention activities.



1: Patient

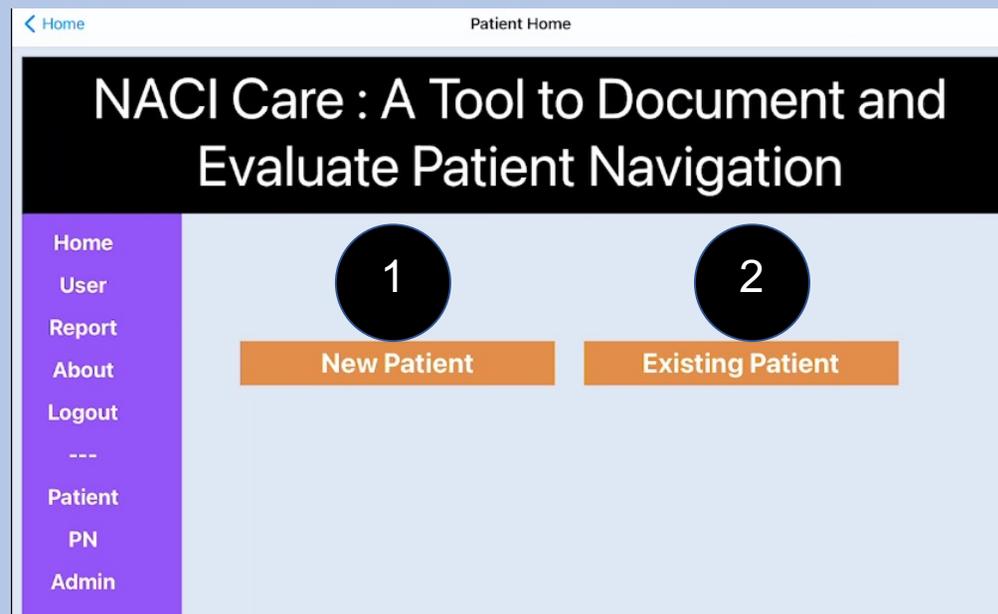
1. This is where information specific to each Patient is added
2. There are two ways to get to the Patient information
 - a. Go to Home Page and Select on Patient button
 - b. Select on Patient in the side bar

NOTE: The PN Administrator's Bar is only accessible to the Administrator and does not show up on the PN's screens



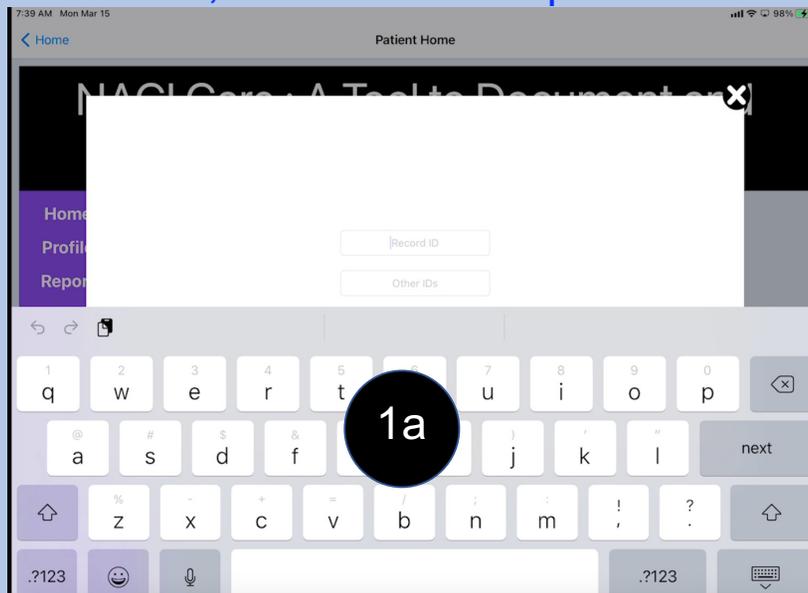
1st Component: Patient -- how to enter data

1. If the Patient is new to NACI Care©, select New Patient
2. If the Patient has been within NACI Care©, select Existing Patient
 - a. If the PN was assigned to a Patient for whom another PN has worked in the past, but s/he were within the system, the Patient still is an *Existing Patient*



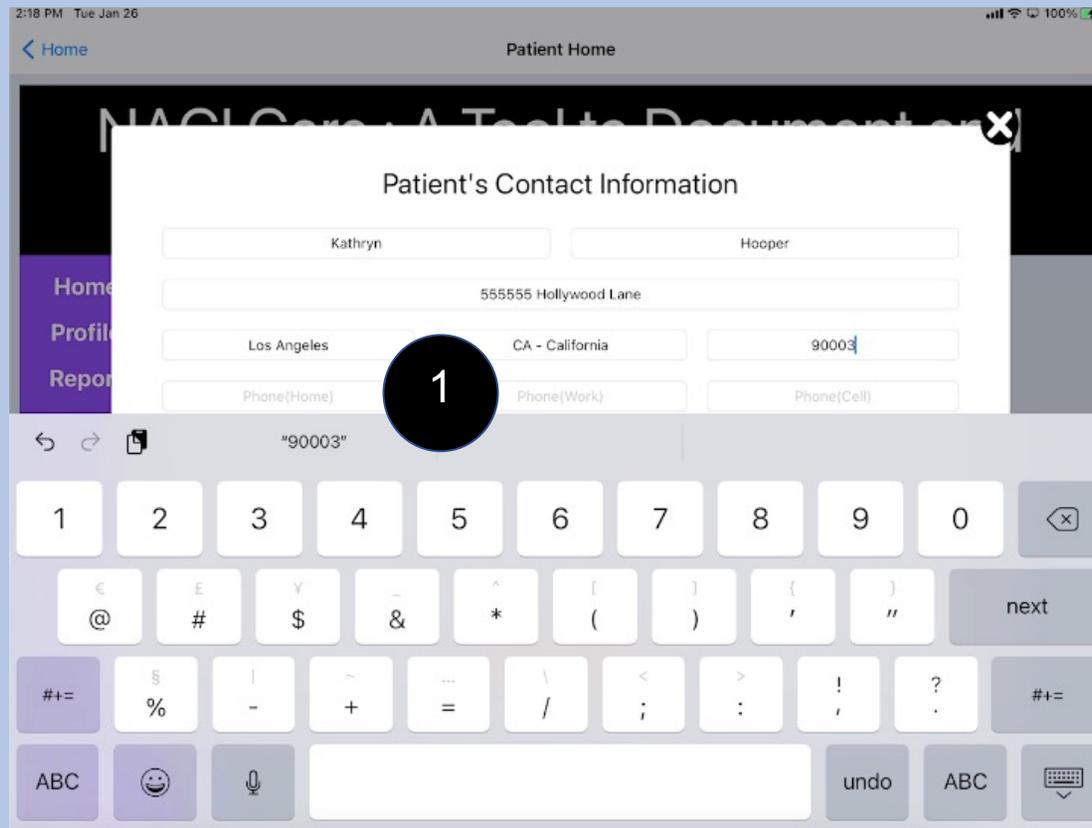
New Patient

1. All patients must have ID and contact info
 - a. Keyboard appears
 - b. Every time a new patient is added to the program, the Patient's ID must be included
 - c. It can be the Patient's medical record number, a specific code, or label, but all data are linked to that ID
 - d. When keyboard covers fields, touch the white portion to drag it higher



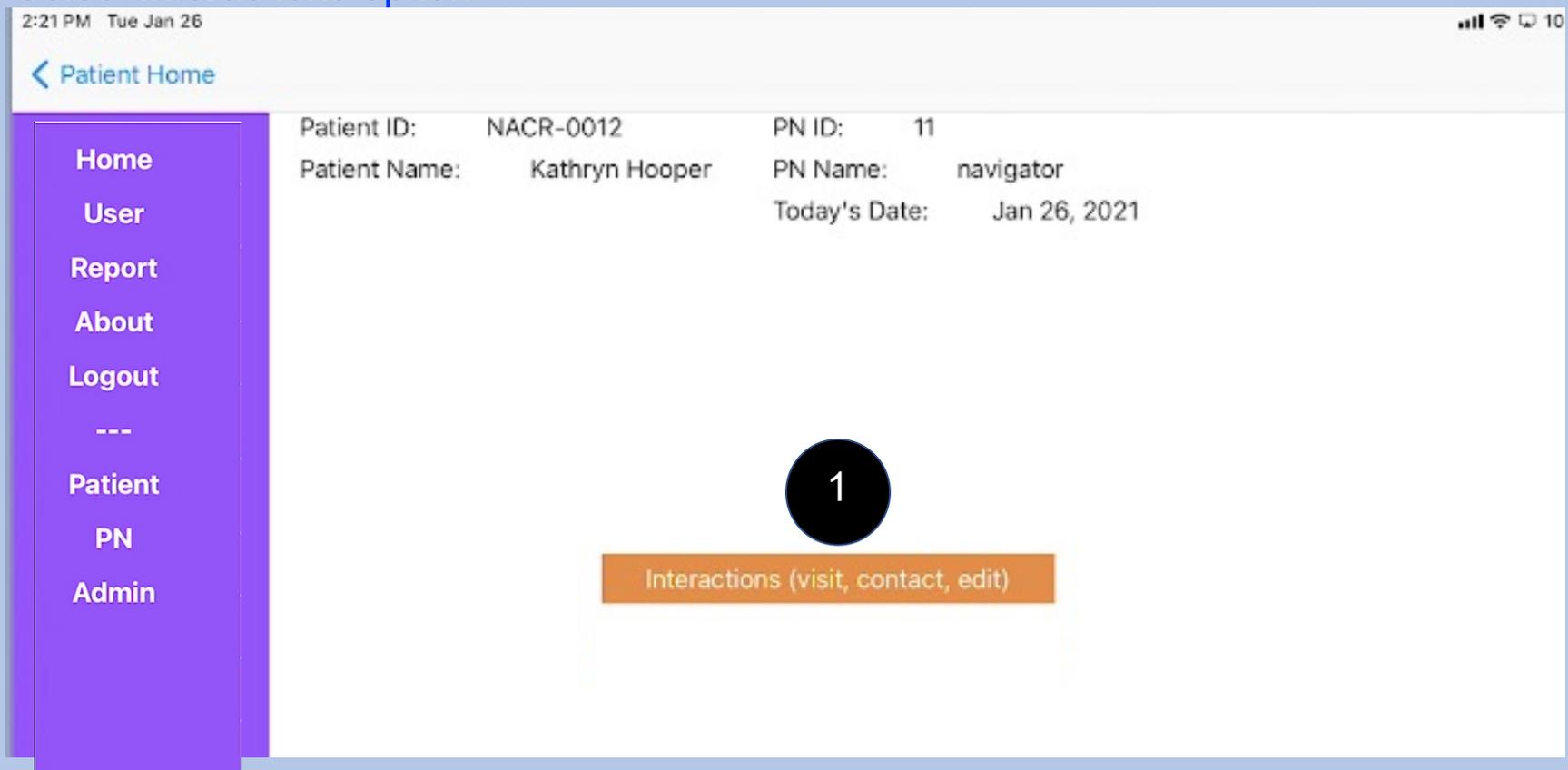
New Patient / Contact Information

1. Keyboard appears to type
2. Enter patient's name, contact information and preferred method of communication



New Patient / Interaction

1. Every encounter with the patient is an interaction
2. Select Interactions option



New Patient / Interaction / Details / Purpose

- 1. Select Purpose(s)
 - a. Toggle response

Purpose

Appointment, schedule or re-schedule	<input type="checkbox"/>
Barrier	<input type="checkbox"/>
Education	<input checked="" type="checkbox"/>
Follow-up	<input type="checkbox"/>
Question	<input type="checkbox"/>
Referral	<input type="checkbox"/>
Reminder	<input type="checkbox"/>
Revise file (correction/edit)	<input checked="" type="checkbox"/>
Scheduled visit	<input type="checkbox"/>
Update Information	<input type="checkbox"/>
Other	<input type="checkbox"/>

1a

2:22 PM Tue Jan 26

[Back](#)

Home

Patient ID: NACR-0012 PN ID: 11
Patient Name: Kathryn Hooper PN Name: navigator
Today's Date: Jan 26, 2021

1

Purpose

Method

Location

Comments



New Patient / Interaction / Details / Method

2. Select Method (menu rolls down to show more options)

Method

Please select an option ▲

- Phone
- Social media
- Telehealth
- Text
- Webinar

2

Previous Next



New Patient / Interaction / Details / Method

3. Select Patient's Location

Patient Location for Interaction

Please select an option ▲

1

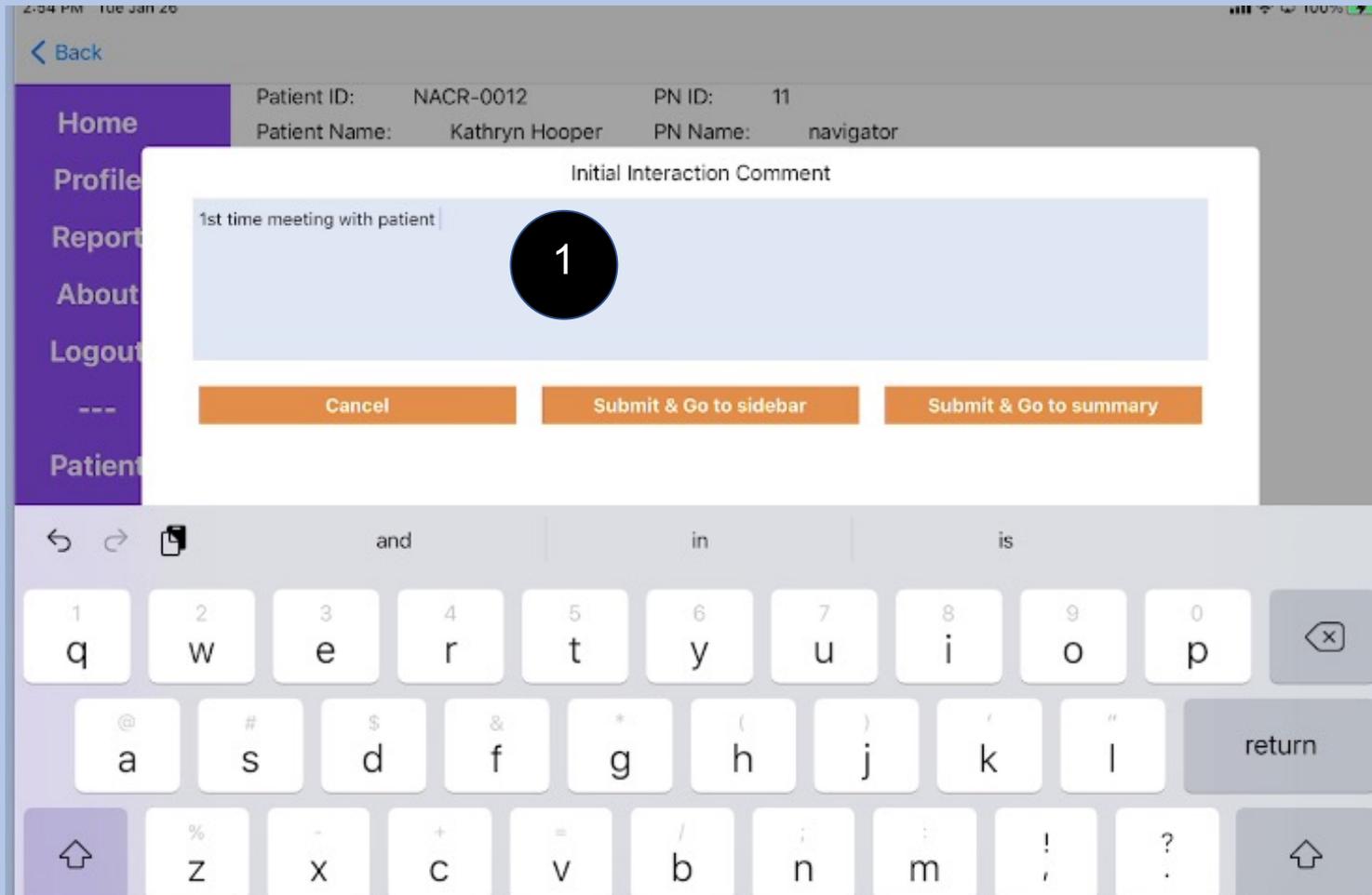
- Clinic
- Hospital
- Patient Home
- PN Office
- Other (write-in)

Previous Next



New Patient / Interaction / Details / Method

4. Type comment specific to initial interaction



New Patient / Interaction / Details / Method

5. After comment is submitted, Go to Sidebar shows Patient Sub-sidebar with explanations to begin adding Patient information

Initial Interaction Comment

1st time meeting with patient

5

Cancel Submit & Go to sidebar Submit & Go to summary

Select from this column

This column provides a brief explanation of each button

Home	Patient ID/Contact Info	Patient identification: Specific patient identifier(s) (medical record number, code number, and/or navigation program identifier, etc.)
User	Emergency Contact	Contains information about upto 3 emergency contacts
Report	Demographics	Demographics: height, weight, education, medical care / insurance, employment, living situation, disabilities learning, mobility, visual, auditory, language, literacy, learning preferences.
About	General Health Behaviors	General Health Behaviors: diet, food security, physical activity, tobacco, alcohol & substance use, sun protection, vaccines, environmental contaminants
Logout	Current Health Status	Current Health Problems and Management: cancer diagnosis, recurrence, metastases, treatments and side effects (symptoms); CVD, digestive, endocrine, hemotologic, infection, integumentary / skin, musculoskeletal, neurologic, oncologic emergencies, psychosocial, psychiatric, renal / urologic.
---	Health History	Past Health Problems and Management: cancer diagnosis, recurrence, metastases, treatments side effects (symptoms) and family cancer history; CVD, digestive, endocrine, hemotologic, infection, integumentary / skin, musculoskeletal, neurologic, oncologic emergencies, psychosocial, psychiatric.
Patient	Barriers & Solutions	Barriers: practical, family, physical, emotional, spiritual, cultural and 6b Solutions: schedule appointments, refer, find resources, complete forms, advocacy, education
PN	Referrals / Appointments	Referrals / Appointments: screening, counseling, CAM, dx, follow-up, molecular cancer tests
Admin	Education	Education: content, format, topics
	Surveys & Data Collection	Surveys & Data Collection: DoI, BRFSS survivor supplement, stress distress, patient goals, self-efficacy, alcohol (NIAAA), patient satisfaction)
	Patient Program Status	Tracking the status of patient(Open, Closed, Navigation services suspended, Deceased)
	Interaction Summary	Show Interaction Summary



New Patient / Interaction / Go to Summary

6. Go to Summary

- a. Preliminary information from the initial visit shows up

Initial Interaction Comment

1st time meeting with patient

6

Cancel Submit & Go to sidebar Submit & Go to summary

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< Back

Home	Patient ID: NACR-0012	PN ID: 11
User	Patient Name: Kathryn Hooper	PN Name: navigator
Report		Today's Date: Jan 26, 2021
About		
Logout		

Patient		
PN		
Admin		

Date of Interaction	2021-01-26
Purpose of Interaction	Appointment; schedule or re-schedule, Scheduled visit
Method of Interaction	Webinar
Patient Location for Interaction	Patient Home
Initial Comments	1st time meeting with patient
Status of Interaction	Select Status

6a



Existing Patient



Patient Home

1. Select Existing Patient



Existing Patient options

2. Choose an option:
 - a. Interaction for any encounter with the patient (e.g., new visit, new contact, call, social media), or to edit previously entered information (misspelling or other error)
 - b. Review to remind about specific patient's details, but cannot add any information

5:53 AM Tue Jan 26

< Back

Patient ID:	NACR-002	PN ID:	11
Patient Name:	Lana Artin	PN Name:	navigator
		Today's Date:	Jan 26, 2021

Home
User
Report
About
Logout

Patient
PN
Admin

2a

Interactions (visit, contact, edit)

Review File (view only)

2b



Existing Patients List: Select Patient

- 3. Multiple ways to sort patient
 - a. Last Visit Date, First or Last Name or ID

8:03 AM Mon Mar 15 100%

[Patient Home](#)

Order By

- Last Visit Date
- First Name**
- Last Name
- Patient ID

Name	Last Visit Date	Patient ID	Created Date
	Feb 21,2021		Feb 21,2021
257	Oct 15,2019		Oct 13,2019
79	May 07,2019		May 07,2019
Laura Abbot	No visit found	00012	Mar 07,2021
Marilyn Abbott	Dec 22,2020	NACR-004	Dec 13,2020
kevin adam	Jan 02,2019	0002	Jan 02,2019
Nate Adams	Dec 29,2021	LUK027	Apr 12,2020
Anita Allen	Jan 10,2021	237712	Apr 12,2020
Moody Allibaster	Jan 12,2021	00129	Sep 19,2019
Lulu Alvarez	Apr 26,2020	0262020PV	Apr 12,2020
Joan Anderson	Sep 30,2020	LUK025	Dec 03,2019
Samuel Anderson	Mar 15, 2019	IIIIIIII	Mar 12, 2019



Existing Patients List: Select Patient / New interaction

4. Selected patient's name, ID, PN's name and ID and Today's Date appear top of each screen
5. List of previous interactions for specific patient
 - a. Select Add New Interaction

Interactions

Back

Patient ID: NACR-002 PN ID: 3 PN Name: NACI
Patient Name: Lana Artin Today's Date: Mar 16, 2021

Add New Interaction

Date of Interaction	Purpose	Method	Status
2021-03-15	Revise file (correction/edit)		
2021-03-15	Revise file (correction/edit)		
2021-03-09	Revise file (correction/edit)		
2021-03-09	Referral		
2021-03-06	Follow-up	Webinar	
2021-02-09	Appointment; schedule	Webinar	Appointment kept



Existing Patient: New Interaction Details

6. Options to track details for each interaction appears

The screenshot shows a mobile application interface for entering a new interaction. On the left is a purple sidebar menu with options: Home, User, Report, About, Logout, ---, Patient, PN, and Admin. The main content area is titled 'New Interaction' and contains the following text: Patient ID: NACR-002, PN ID: 3, PN Name: NACI, Patient Name: Lana Artin, and Today's Date: Mar 16, 2021. Below this text are four orange buttons: Purpose, Method, Location, and Comments. A black circle with the number '6' is overlaid on the 'Method' button.



Existing Patient / Interaction / Details / Purpose

6a. Select Purpose(s)
6a1) Toggle response

Purpose

Appointment, schedule or re-schedule	<input type="checkbox"/>
Barrier	<input type="checkbox"/>
Education	<input checked="" type="checkbox"/>
Follow-up	<input type="checkbox"/>
Question	<input type="checkbox"/>
Referral	<input type="checkbox"/>
Reminder	<input type="checkbox"/>
Revise file (correction/edit)	<input checked="" type="checkbox"/>
Scheduled visit	<input type="checkbox"/>
Update Information	<input type="checkbox"/>

6a1)

< Interactions

Home
User

New Interaction

Patient ID: NACR-002 PN ID: 3 PN Name: NACI
Patient Name: Lana Artin Today's Date: Mar 16, 2021

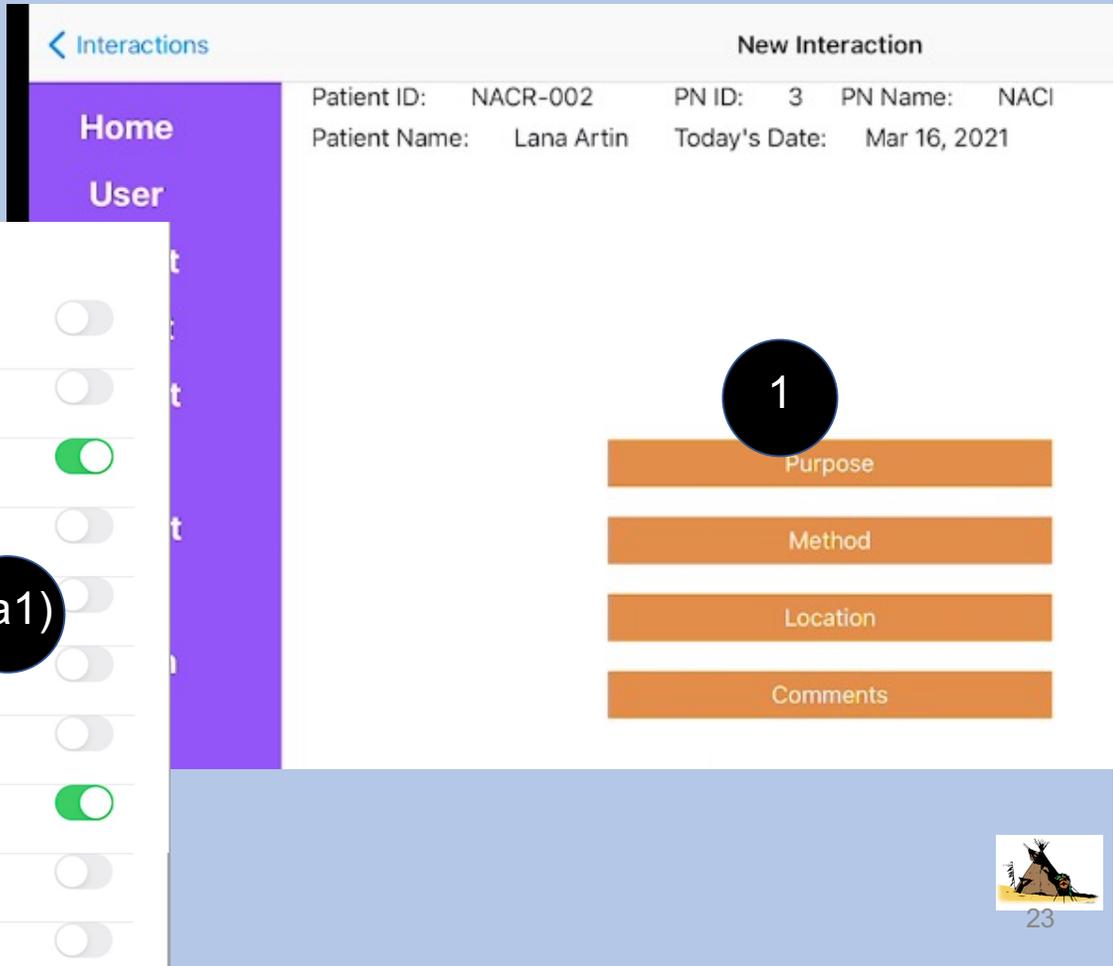
1

Purpose

Method

Location

Comments



Existing Patient / Interaction / Details / Method

6b. Select Method (menu rolls down to show more options)

Method

Please select an option ▲

- Phone
- Social media
- Telehealth
- Text
- Webinar

6b

Previous Next



Existing Patient / Interaction / Details / Method

6c. Select Patient's Location

Patient Location for Interaction

Please select an option ▲

- Clinic
- Hospital
- Patient Home
- PN Office
- Other (write-in)

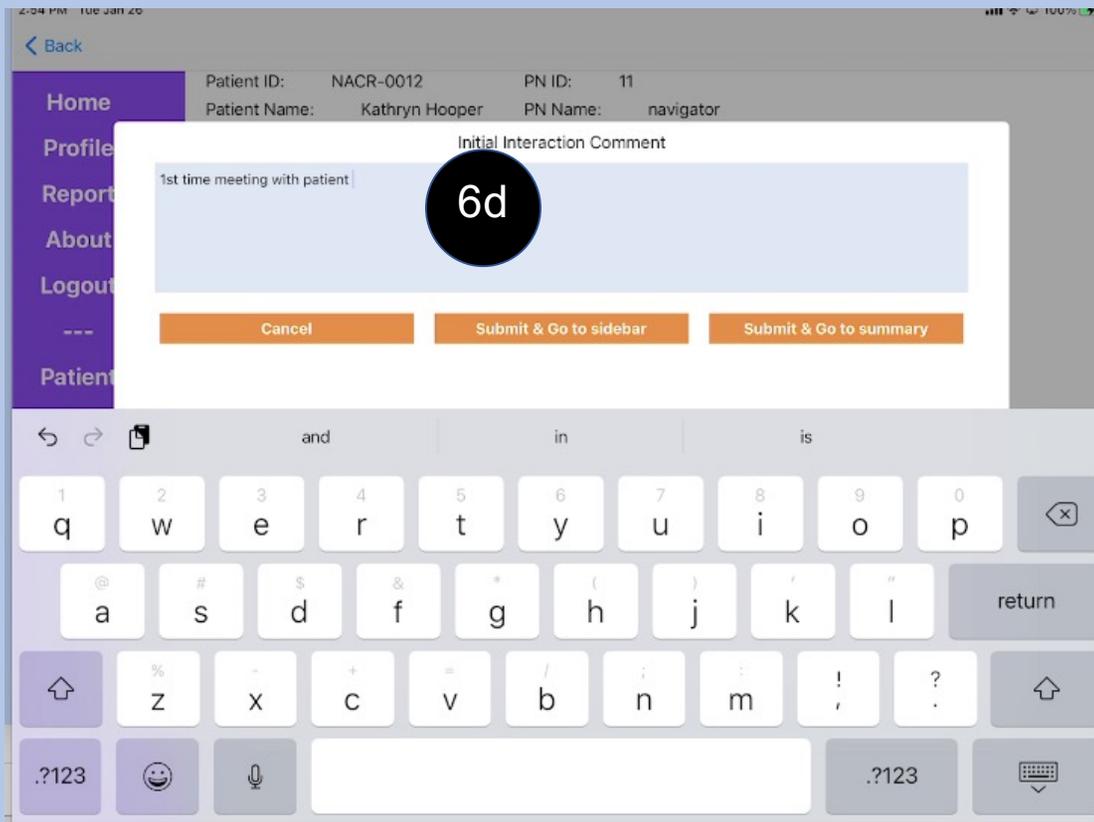
6c

Previous Next



Existing Patient / Interaction / Details / Method

6d. Type comment specific to initial interaction



Existing Patient / Interaction / Details / Method

6e. After comment is submitted, Select Go to Sidebar

Initial Interaction Comment

1st time meeting with patient

6e

Cancel Submit & Go to sidebar Submit & Go to summary

6e

3:04 PM Fri Mar 19

< New Interaction

Patient Sub-Sidebar

Home	Patient ID/Contact info	Patient Identification: Specific patient identifier(s) (medical record number, code number, and/or navigation program identifier, etc.)
User	Emergency Contact	Contains information about upto 3 emergency contacts
Report	Demographics	Demographics: height, weight, education, medical care / insurance, employment, living situation, disabilities learning, mobility, visual, auditory, language, literacy, learning preferences.
About	General Health Behaviors	General Health Behaviors: diet, food security, physical activity, tobacco, alcohol & substance use, sun protection, vaccines, environmental contaminants
Logout	Current Health Status	Current Health Problems and Management: cancer diagnosis, recurrence, metastases, treatments and side effects (symptoms); CVD, digestive, endocrine, hemotologic, infection, integumentary / skin, musculoskeletal, neurologic, oncologic emergencies, psychosocial, psychiatric, renal / urologic,
---	Health History	Past Health Problems and Management: cancer diagnosis, recurrence, metastases, treatments side effects (symptoms) and family cancer history; CVD, digestive, endocrine, hemotologic, infection, integumentary / skin, musculoskeletal, neurologic, oncologic emergencies, psychosocial, psychiatric,
Patient	Barriers & Solutions	Barriers: practical, family, physical, emotional, spiritual, cultural and 6b Solutions: schedule appointments, refer, find resources, complete forms, advocacy, education
PN	Referrals / Appointments	Referrals / Appointments: screening, counseling, CAM, dx, follow-up, molecular cancer tests
Admin	Education	Education: assessment, format, topics
	Surveys & Data Collection	Surveys & Data Collection: QoL, BRFSS survivor supplement, stress distress, patient goals, self-efficacy, alcohol (NIAAA), patient satisfaction)
	Patient Program Status	Tracking the status of patient(Open, Closed, Navigation services suspended, Deceased)
	Interaction Summary	Show Interaction Summary



Existing Patient / Interaction / Go to Summary

- 6f. Or after comment is submitted,
Go to interaction summary
1) Preliminary information
from the initial visit shows up

Initial Interaction Comment

1st time meeting with patient

6f

Cancel Submit & Go to sidebar Submit & Go to summary

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< Back

Home	Patient ID: NACR-0012	PN ID: 11
User	Patient Name: Kathryn Hooper	PN Name: navigator
Report		Today's Date: Jan 26, 2021
About		
Logout		

Patient		
PN		
Admin		

Date of Interaction	2021-01-26
Purpose of Interaction	Appointment; schedule or re-schedule,Scheduled visit
Method of Interaction	Webinar
Patient Location for Interaction	Patient Home
Initial Comments	1st time meeting with patient
Status of Interaction	Select Status

6f1)



Choose option To Review Existing Patient's File (cannot add any data in this mode)

1. Review file brings patient's contact information
2. Choose topic from Patient Sub-sidebar to refresh memory about patient's specific issues

Home
User
Report
About
Logout

Patient
PN
Admin

Patient ID/Contact Info
Emergency Contact
Demographics
General Health Behaviors
Current Health Status
Health History
Barriers & Solutions
Referrals / Appointments
Education
Surveys & Data Collection
Patient Program Status

Patient ID: NACR-002 PN ID: 3 PN Name: NACI
Patient Name: Lana Artin Today's Date: Mar 16, 2021

Patient Identification
Contact

Name	Lana Artin
City	Torrance
State	CA - California
Zip	90844

Lives With
Spouse, Children, Parents

Preference Of Contact
In-Person

BACK

Patient ID: NACR-002 PN ID: 3 PN Name: NACI
Patient Name: Lana Artin Today's Date: Mar 16, 2021

Home
User
Report
About
Logout

Patient
PN
Admin

Interactions (visit, contact, edit)

Review File (view only)



Review Existing Patient's File

3. For examples, Select Barriers & Solutions from the Patient Sub-sidebar

< Back

Home User Report About Logout --- Patient PN Admin	Patient ID/Contact Info	Patient ID: NACR-002 PN ID: 3 Patient Name: Lana Artin PN Name: NACI Today's Date: Mar 15, 2021	
	Emergency Contact		
	Demographics	Practical Barrier : 2018-11-19	
	General Health Behaviors	Financial	
	Current Health Status	Debt issues	See solutions
	Health History	Practical Barrier : 2018-01-20	
	Barriers & Solutions	Financial	
	Referrals / Appointments	Insurance issues	See solutions
	Education	Logistic Housing	
	Surveys & Data Collection	Cannot find safe housing	See solutions
	Family Barrier : 2019-07-10		



Existing Patient / Review File / Barriers / Solutions

3a. When select “Solutions” for each barrier, such as for “Changing family role”, the solutions with date entered and type of solution appears

Scheduled Appointment Solution	
Side effects / symptom management	
Specific schedule name	Dr. Scott
Appointment Tracking	
Appointment creation date	2019-07-10
Appointment scheduled date	2019-07-12
Appointment Refer to whom	Marilyn Smith
Was the appointment rescheduled	
Appointment rescheduled date	
Was the appointment completed	Yes
Date of completion	2019-07-12
Appointment outcome	Not applicable
Financial (employment; insurance; ability to pay; food insecurity)	
Specific schedule name	



Review Existing Patient's File

- 4. Information for each topic is summarized, for example Current Health Status
- 5. Only information loaded into that category shows up

[← Back](#)

Home User Report About Logout --- Patient PN Admin	Patient ID/Contact Info	Patient ID: NACR-002 PN ID: 3 PN Name: NACI	
	Emergency Contact	Patient Name: Lana Artin Today's Date: Mar 16, 2021	
	Demographics	Current health status	
	General Health Behaviors	Health Status	
	Current Health Status	Cancer Type	Breast
	Health History	Breast	
	Barriers & Solutions	Clinical Trials Ipataserib in combination with Carboplatin/Paclitaxel, or Capecitabine	
	Referrals / Appointments	Is currently taking part in the trial	Yes
	Education	Type of the trial	Quality of Life / Supportive Care / Care
	Surveys & Data Collection	Name of the trial	Ipataserib in combination with Capecitabine, or Paclitaxel, or Capecitabine/Atezolizumab
Patient Program Status	Purpose of the trial	Reduce likelihood of recurrence or metastasis; address side effects	
	Dates	03/04/2019-	
	Did complete the trial	Yes	

Review Existing Patient's File

6. If under Health History, did not have previous cancer info, the health history does not show any cancer history even though the patient currently has cancer
 - a. When error is noted (e.g., learn that the patient had a previous cancer experience or any other error such as, no date for when application to housing office form was submitted), select "Back" until reach screen to select Interactions rather than review

< Back

Home User Report About Logout --- Patient PN Admin	Patient ID/Contact Info	Patient ID: NACR-002	PN ID: 3	PN Name: NACI
	Emergency Contact	Patient Name: Lana Artin	Today's Date: Mar 16, 2021	
	Demographics	Health history		
	General Health Behaviors	Health Status		
	Current Health Status	Hospital Admission		
	Health History	Reasons: Side effect		
	Barriers & Solutions	Admission date	2019-04-28	
	Referrals / Appointments	Family cancer history		
	Education			
	Surveys & Data Collection			
Patient Program Status				



Existing Patient / Review File / Barriers linked to Solutions

6b. Select "Interaction" to add correct information

back

Home
User
Report
About
Logout

Patient
PN
Admin

Patient ID: NACR-002 PN ID: 3 PN Name: NACI
Patient Name: Lana Artin Today's Date: Mar 16, 2021

6b

Interactions (visit, contact, edit)

Review File (view only)



Help and Support

- 1) To get help within 24 hours, please email: help.naci@gmail.com with your phone number
- 2) To get help within 12 hours, please email with subject "NACICARE" to help.naci@gmail.com [for member with subscription only] with your phone number
- 3) To get help immediately, please email with subject "NACICARE" to driqbal@gmail.com [for premium member only] with your phone number

