

NACI Care:

A Patient Navigation Data Entry and Evaluation Program

Administrator Tutorial

July 2, 2021 version

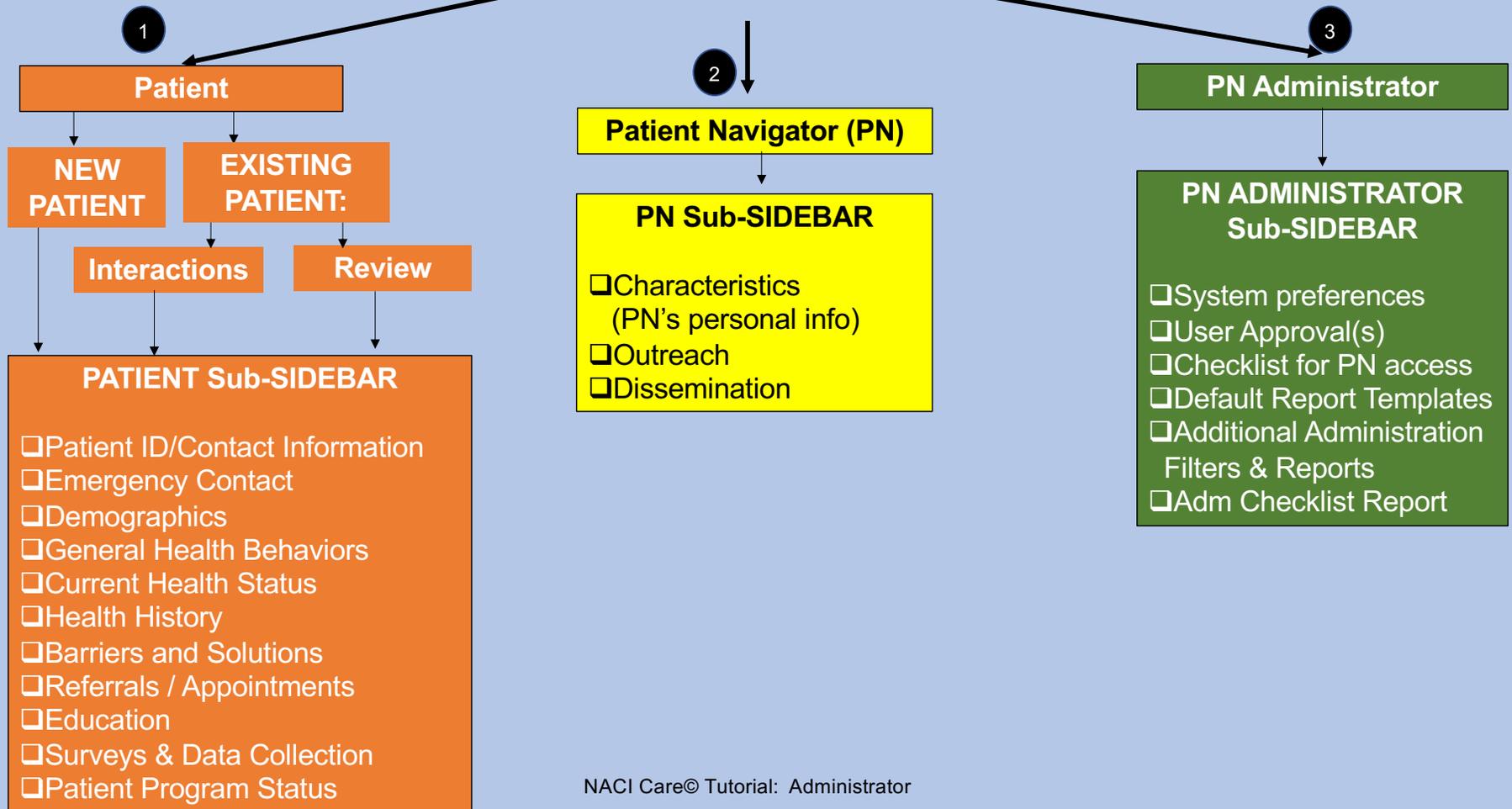


Overview of NACI Care©



Figure 1. Program map for NACI Care©

Three components

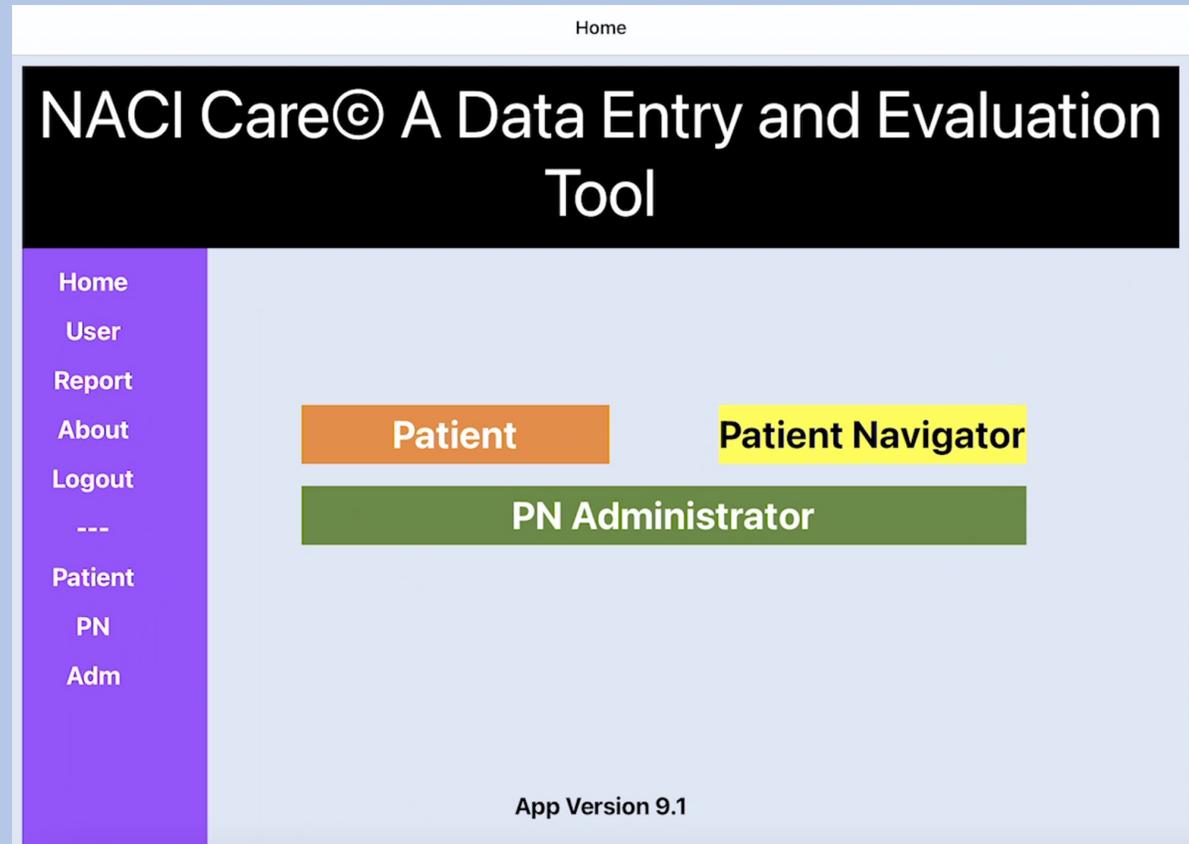


What's in the NACI Care Home?

The Home screen allows the user to go to:

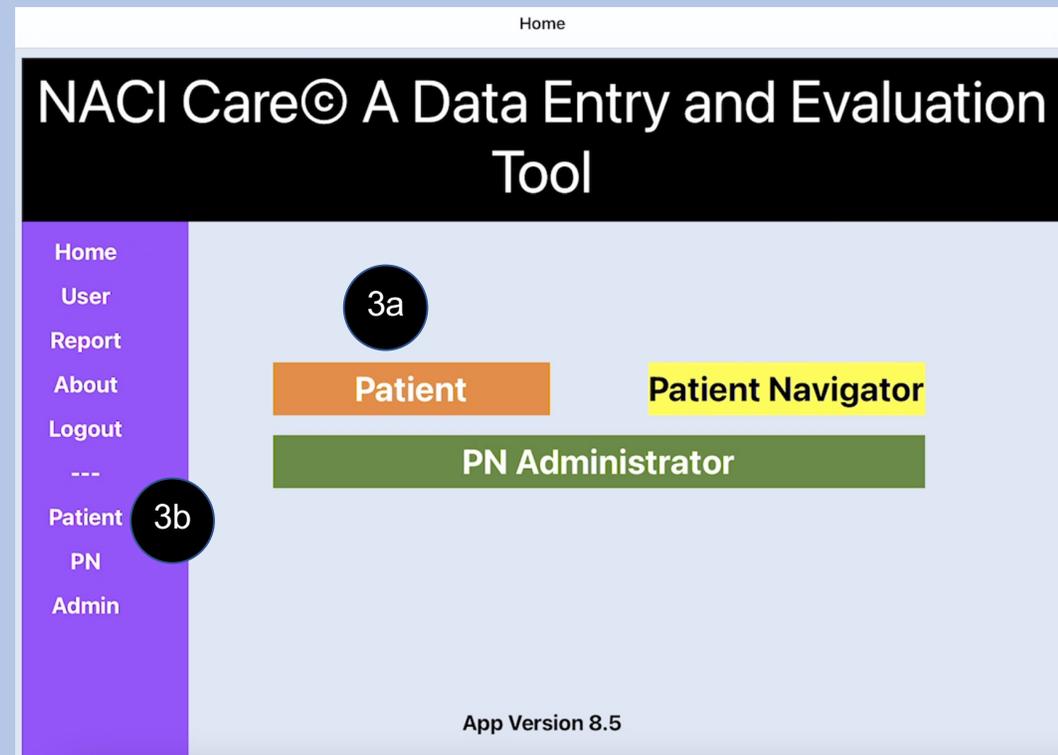
1. Patient
2. Patient Navigator
3. PN Navigation Administrator

NOTE: only the Administrator (Admin) can access the PN Administrator functions



Patient

1. Where information specific to each Patient is added
2. Both the PN and PN Administrator can add information
3. Two ways to access the Patient component
 - a. Click on the Home button and then click on the Patient button, OR
 - b. Click on Patient in the side bar to access fields



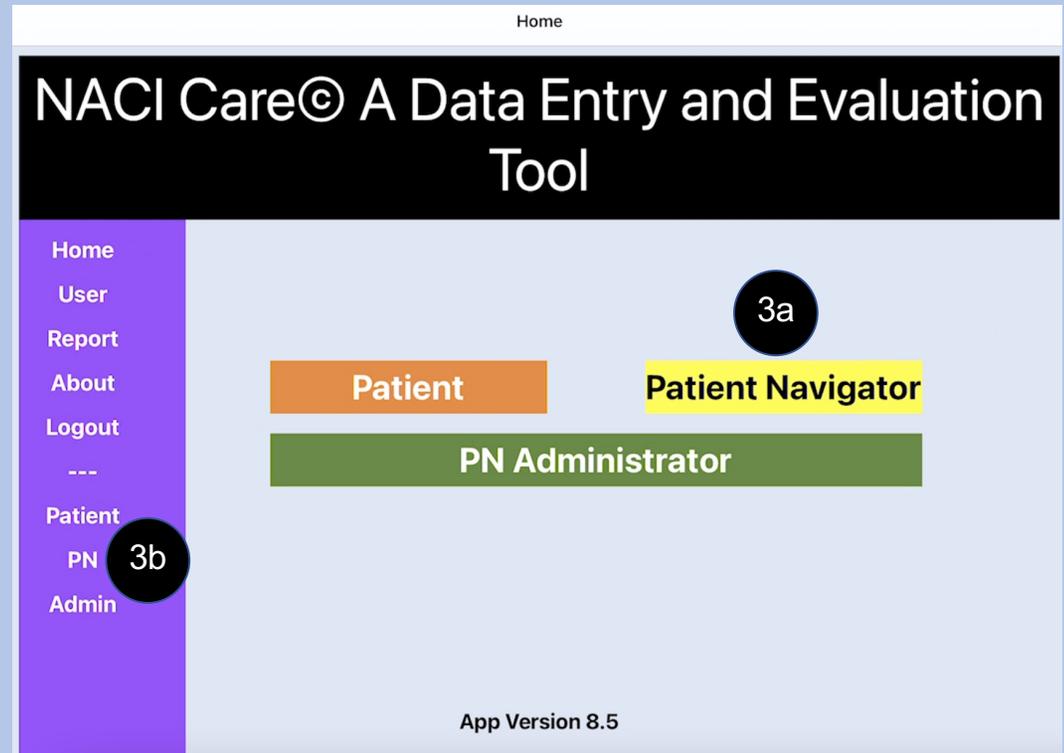
Overview of Patient Component

1. Patient Sub-Sidebar and explanations of content

< New Interaction		Patient Sub-Sidebar
Home	Patient ID/Contact Info	Specific patient identifiers (medical record number, program ID, etc) and patient contact information
User	Emergency Contacts	Upto 3 emergency/alternative contacts for the patient
Report	Demographics	Gender, religion, height, weight, vision, hearing, mobility, literacy, learning, education, employment, living situations.
About	General Health Habits	Diet, food security, physical activity, tobacco, alcohol, substance use, sun protection, vaccines, contaminants
Logout	Current Health Status	Medical conditions (cancer, infection, psychiatric, etc.), surgeries, hospital admissions, ER visits, medications, screening and diagnostic tests
---	Health History	Medical conditions (cancer, infection, psychiatric, etc.), surgeries, hospital admissions, ER visits, family cancer history
Patient	Barriers & Solutions	Barriers: practical, financial, emotional, physical, spiritual, cultural; Solutions: referrals, appointments, resources
PN	Referrals & Appointments	Counseling, complementary, therapy, diagnosis, follow-up, screening and diagnostic testing
Adm	Education	Assessment, format, topics
	Surveys & Data Collection	QoL, BRFSS, stress, distress, patient/program satisfaction, patient goals, alcohol, self-efficacy
	Patient Program Status	Tracking the status of the patient within the program (open, closed, suspended, deceased)
	Interaction Summary	Summary of the current patient interaction

2: Patient Navigator (PN)

1. Where information specific to each PN is added
2. Both the PN and PN Administrator can add information
3. Two ways to access the Patient Navigator component
 - a. Click on the Home button and then click on the Patient Navigator button
 - OR
 - b. Click on PN in the side bar to access fields



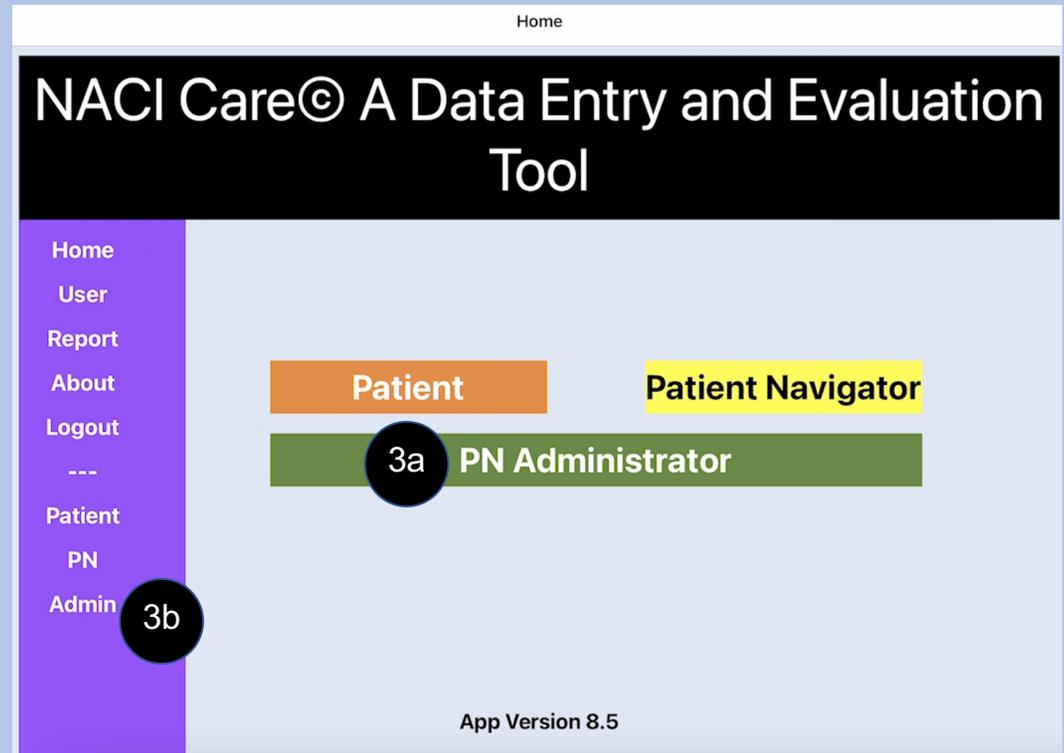
Overview of Patient Navigator Component

Patient Navigator Sub-Sidebar and explanations of content

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

3: PN Administrator

1. Exclusively for the Administrator
2. Allows only one Administrator to customize NACI Care© options (to avoid contradictory information)
3. There are two ways to get to the Administrator's controls
 - a. Click on the Home button and then click on the PN Administrator button OR
 - b. Click on Admin in the side bar to access fields

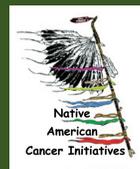


Overview PN Administrator Sub-Sidebar

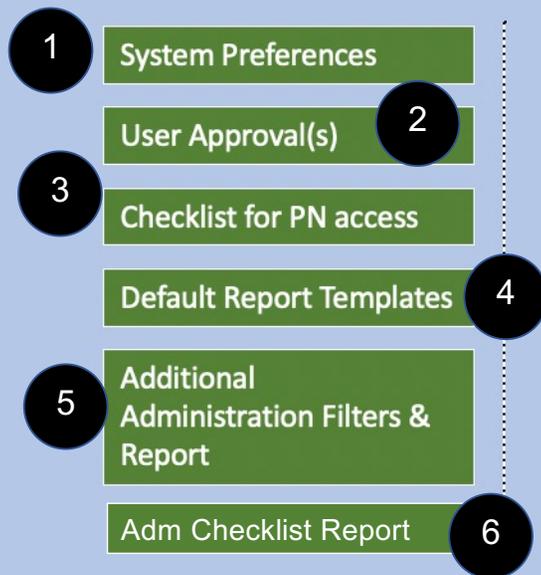
1. PN Administrator Sub-Sidebar and explanations of content
2. Choose options from buttons in the left column
3. The right column is a summary of what is included

System Preferences	Use US or metrics for measurements; link to EPIC
User Approval	Form to approve PN and Staff access to NACI Care
Checklist for PN access	Identifies app content and options Administrator has made accessible to the PN; allows the Administrator to add or remove accessible options
Default Report Templates	Clarifies filters, includes sidebar/buttons to access default report templates for evaluating PNs and the navigation program (components and total program)
Additional Administrative Filters & Reports	Customization options for reports for individual or group of PNs and program evaluation items; reports available only to Administrator
Admin Checklist Report	Shows selected checklist in report

PN Administrator Sub-Sidebar



Overview of PN Administrator Sub-sidebar Options



1. System preferences, such as Metric or Imperial (American) measurement system and link to EHR (when available)
2. Approval form for PN/staff access to NACI Care©
3. Checklist for PN access to topics /sections within NACI Care© (defaults plus optional features)
4. Report templates for items recommended by national patient navigation organizations
5. Options to tailor reports specific to the program
6. Summary of data fields approved for use by PN

PN Administrator's Sub-sidebar

1. Select System Preferences

1

a. Select Measurement System

- 1) Select either Metric or American system of measurements
- 2) If the PN program is being used both in the USA and another country, contact help.naci@gmail.com to allow both systems to function in NACI Care©

The screenshot displays the 'System Preference' page in the NACI Care© application. On the left is a purple sidebar with navigation options: Home, Profile, Report, About, Logout, ---, Patient, PN, and Admin. The main content area shows a list of system preferences: System Preferences, User Approval(s), Checklist for PN access, Default Report Templates, and Additional Administration Filters & Reports. The 'System Preferences' section is expanded, showing two options: 'Measurement System' (marked with a circled 'a') and 'Link to EPIC EHR'. Below this, a modal dialog box is open with the title 'Does the program use metric or American system of measurements?'. The dialog contains a dropdown menu with three options: 'American System', 'Metric System', and 'American System' (marked with a circled 'a1'). At the bottom of the dialog are 'Cancel' and 'Submit' buttons.

PN Administrator's Sidebar – System Preferences

- Home
- Profile
- Search
- Help
- Reports
- Settings
- About
- Tutorial
- Logout
-
- Patient
- PN
- Adm

- System Preferences
- User Approval(s)
- Checklist for PN access
- Default Report Term
- Additional Adminis
- Filters & Report
- Adm Checklist Rep

- b. Should the program interface to Electronic Health Records (EHR)?
1) Select Yes or No

b Does the program link to EPIC EHR?

Yes

Yes **b1)**

No

Cancel Submit

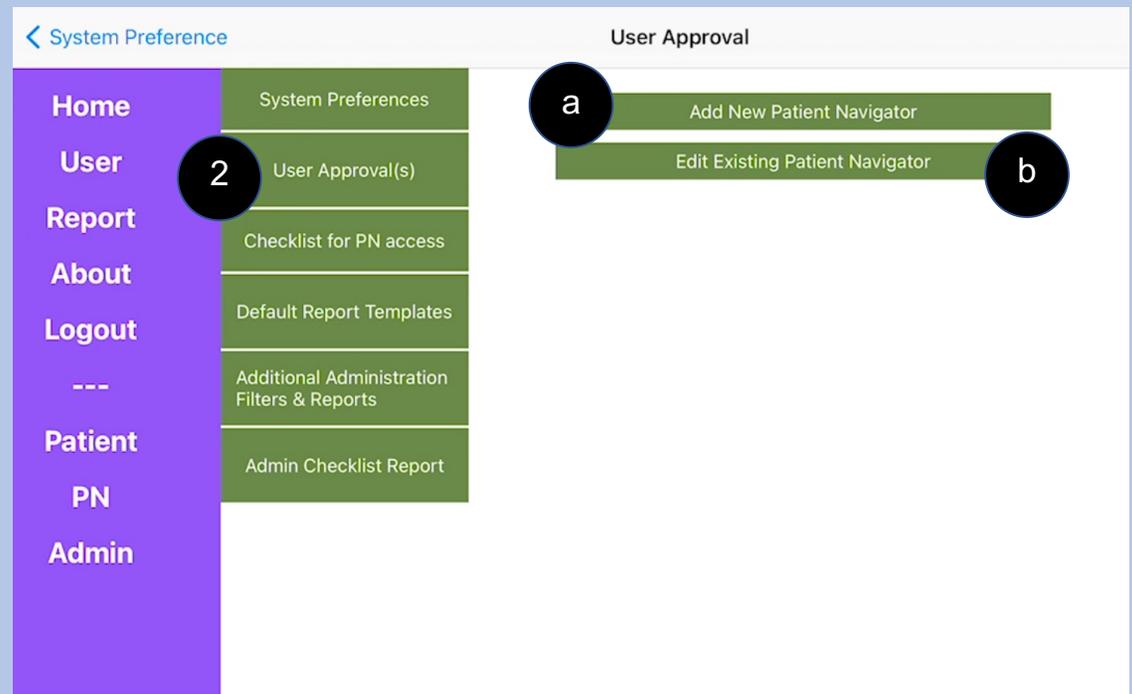
NOTE: A Yes response will not yet link to EHR; this function will be added later in 2021

PN Administrator's Sidebar – User Approval(s)

2. Select User Approval(s) to establish who can access and enter information into NACI Care©. The Administrator can:
 - a. Add as many people as are allowed by the NACI Care© license*
 - b. Edit information for each existing user

*Reminder: The number of PNs are limited by the program license

If additions beyond license limit, message appears, *“The Administrator has reached the maximum number of users. For additional PN, the license needs to be changed Add Iqbal's email access*

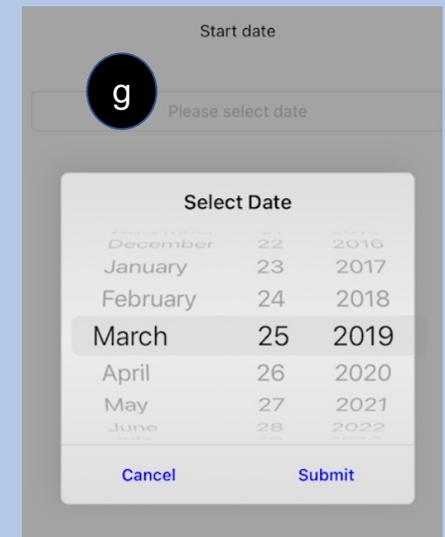
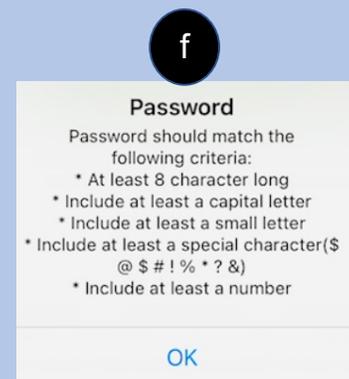


PN Administrator's Sidebar – User Approval(s)

- c. Add New Patient Navigator information
- d. Add contact information
- e. Assign an ID (can be the PN's email address; do not use an ID for more than one user)
- f. Assign a password specific to the PN; Select SHOW to confirm password is correct; Note password criteria (at least 8 characters and include a capital and lower-case letter, at least one number and at least one special character)
- g. Enter the PN's start date through the rolling calendar



A screenshot of a form titled 'Add new PN'. The form has several input fields: a name field containing 'Jessie', an ID field containing 'Rogers', an email field containing 'irogers@naci.com', a password field containing 'Happypatient#' with a 'HIDE' button to its right, and a start date field containing '2019-03-25'. At the bottom are 'Cancel' and 'Submit' buttons. Black circles with letters 'd', 'e', and 'f' are placed over the form title, the ID field, and the password field respectively.



User Approval(s)

- h. When PN information changes (e.g., new last name, new password), Select Edit Existing Patient Navigator
- i. The complete list of PNs appears
- j. Select Edit
- k. If the PN no longer works for the navigation program, enter an End Date

Select Date		
February	26	2017
March	27	2018
April	28	2019
May	29	2020
June	30	2021
July	31	2022
August	1	2023

Name	Email	Start Date	End Date	
Kerry Arman	karman@naci.com	2019-04-04		Edit
Paula Esperanza	Esperanza@naci...	2018-07-22		Edit
Marilyn Kanagi	mkanagi@naci.com	2016-09-07	2025-12-31	Edit
Cindy Manson	cmanson@naci.c...	2017-08-10		Edit
Rosalie Martinez	rmartinez	2018-03-17	2018-07-13	Edit
Barney Miller	bmiller@naci.com	2017-05-01	2019-06-30	Edit
Everly Most	emost@naci.com	2019-07-09		Edit
Jessie Rogers	jrogers@naci.com	2019-03-25		Edit
Jackie Smith	jsmith@naci.com	2019-04-26		Edit
Linda Smith	lsmith44@naci.co...	2018-06-01	2021-10-14	Edit
Rodney Smith	Rodney@naci.com	2017-08-02		Edit
Andy Smith	asmith@naci.com	2016-11-01		Edit
Audrey Stead	astead@naci.com	2015-06-02		Edit
Randy Strong	rstrong@naci.com	2019-11-10		Edit
Clara Thomas	555556666	2018-09-02		Edit

PN Administrator Checklist for PN personal fields



Checklist for PN access (PN refers to the user of NACI Care©)

Home	System Preferences
Profile	User Approval(s)
Search	3 Checklist for PN access
Help	Default Report Templates
Reports	Additional Administration
Settings	Filters & Report
About	Adm Checklist Report
Tutorial	
Logout	

Patient	
PN	
Adm	

3. NACI Care© has more than 5,000 fields; no program would ever use them all
 - a. The checklist allows the Administrator to select the NACI Care© fields the PN can use. For example, PN Administrators can:
 - 1) Include one or more patient surveys needed for a grant
 - 2) Exclude fields not pertinent to a cancer screening navigation program
 - b. The checklist avoids adding information unnecessary for a specific program
 - 1) Fields can be removed or added at any time
 - 2) When fields are removed, data are not lost

Checklist for PN access

- c. Selecting Checklist for PN access Shows major topics for patient information (similar to the Patient Sub-Sidebar)
- d. Most options include a Select All choice. Click on the Select All button again to unselect all
- e. Administrator selects each toggle button (turns green) to identify items that will display in the PN's view of each screen.
- f. Default selections appear as grey highlighted fields and will automatically appear in a topic.
NOTE: [the defaults are not yet greyed out]



Checklist Topics for PN access (see details in Tutorial for Patient information; Greyed out items are defaults):

Demographics

- Birth date
- Gender
- Sexual Orientation
- Race & Ethnicity
- Religion
- Height/Weight
- Education
- Employment
- Medical Care
- Health Insurance
- Language, Literacy and Learning
- Lives with
- Dependent Children / Elders

General Health Behaviors:

- Alcohol
- Environmental Contaminants
- Nutrition / diet
- Physical Activity
- Substance Use
- Sun Protection
- Tobacco Use
- Vaccines
- Rate Patient's general Health
- Rate patient's quality of life

Current Health Status

- Health Issues: Medical
- Health Issues: Surgeries
- Hospital Admission(s)
- Emergency Visit
- Medications
- Screening, diagnostic and follow-up tests

Checklist for PN access – includes (see details in Tutorial for Patient information; Greyed out items are defaults):

Health History

Health Issues: Medical

Health Issues: Surgeries

Hospital Admission(s)

Emergency Visit

Family Cancer History

Solution: Scheduled appointments/ refer

Solution: Find resources

Solution: Complete forms

Solution: Advocacy

Solution: Education

Other Solutions (fill-in space)

Barriers and Solutions

Practical Barrier(s)

Family Barrier(s)

Physical Barrier(s)

Emotional Barrier(s)

Spiritual / religious Barrier(s)

Cultural Barrier(s)

Other Barrier(s)

Referrals / Appointments

Screening, diagnostic and follow-up tests

Counseling

Complementary / Integrative / Alternative
Medicine

Symptom Management

Other type of appointments

Checklist for PN access – includes (see details in Tutorial for Patient information):

Education

- Education Topic Assessment

Survey(s)

- Overall health
- Quality of life
- Behavioral Risk Factor Surveillance System (BRFSS)
- Symptom Distress Scale (McCorkle short version)
- National Comprehensive Cancer Network (NCCN) Problem List
- Patient Goals
- Self-efficacy
- Alcohol consumption survey

Survey(s) continued

- Survivorship care plans
- PN Satisfaction
- PN Program Satisfaction

Patient Program Status

- Open
- Closed
- Navigation services suspended
- Deceased
- Other

Checklist for PN access: Surveys

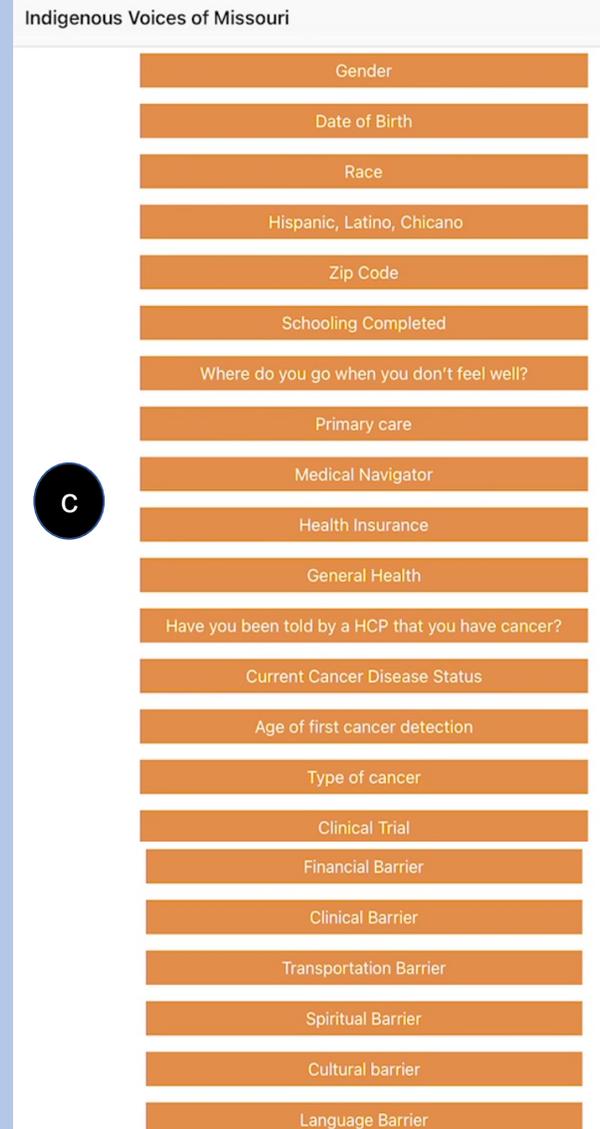
1. As of 2021, NACI Care© includes 11 Standard surveys. The NACI Care© Team continues to add others based on recommendations from informant interviews.*
 - a. Overall health
 - b. Quality of life
 - c. Behavioral Risk Factor Surveillance System
 - d. Symptom Distress Scale (McCorkle short version)
 - e. National Comprehensive Cancer Network (NCCN) Problem List
 - f. Patient Goals
 - g. Self-efficacy
 - h. Scroll to see all items: Alcohol consumption survey
 - i. Survivorship care plans
 - j. PN Satisfaction
 - k. PN Program Satisfaction

Survey Item	Status
Overall health	Checked
Quality of life	Checked
Behavioral Risk Factor Surveillance System	Unchecked
Symptom Distress Scale (McCorkle short version)	Checked
National Comprehensive Cancer Network Problem List	Unchecked
Patient Goals	Checked
Self efficacy	Unchecked
Alcohol consumption survey	Unchecked
Survivorship care plans	Checked
PN Satisfaction	Checked
PN Program Satisfaction	Unchecked
How did the patient learn about this PN program?	Unchecked

***NOTE: Individualized tools may be added for an additional fee; fee based on number and complexity of items or scoring**

Checklist for PN access: Surveys

1. If the Admin wants or needs an individualized/ tailored survey or tool, contact help.naci@gmail.com. A fee will be charged based on complexity and length. For example, the *Indigenous Voices of Missouri*
 - a. Under Survey, the top option is the survey specific to the Voices grant
 - b. The list of survey items specific for the Voices grant



Default Report Templates



Default Report Templates

- Home
- Profile
- Search
- Help
- Reports
- Settings
- About
- Tutorial
- Logout
-
- Patient
- PN
- Adm

- System Preferences
- User Approval(s)
- Checklist for PN access
- Default Report Templates **4**
- Additional Administration Filters & Report
- Adm Checklist Report

d. These are reports recommended by National PN Advisory organizations (e.g., Commission on Cancer, Oncology Nursing Society, Academy of Oncology Nurse and Patient Navigators (AONN+))

a. Select the button

NOTE: Return on Investment Reports not yet included

< Home		PN Administrator	
Home	System Preferences	Use US or metrics for measurements; link to EHR	
User	User Approval	Form to approve PN and Staff access to NACI Care	
Report	Checklist for PN access	Identifies app content and options Administrator has made accessible to the PN; allows the Administrator to add or remove accessible options	
About	Default Report Templates a	Clarifies filters, includes sidebar/buttons to access default report templates for evaluating PNs and the navigation program (components and total program)	
Logout	Additional Administrative Filters & Reports	Customization options for reports for individual or group of PNs and program evaluation items; reports available only to Administrator	
---	Adm Checklist Report	Shows selected checklist in report	
Patient			
PN			
Adm			

Default Report Templates:

1. Select all or select the button for reports of relevance to the program.
 - a. For example, select Navigation Load
 - b. Four types of reports appear
 - c. Select Navigation Caseloads

Default Report Templates

Select all

Navigation Load

Compliance

Patient / Participants' Characteristics

Referrals

Diagnosis & Treatments

Hospital

Surveys

PN Characteristics

Cancel Submit

Navigation Load

Navigation Caseloads

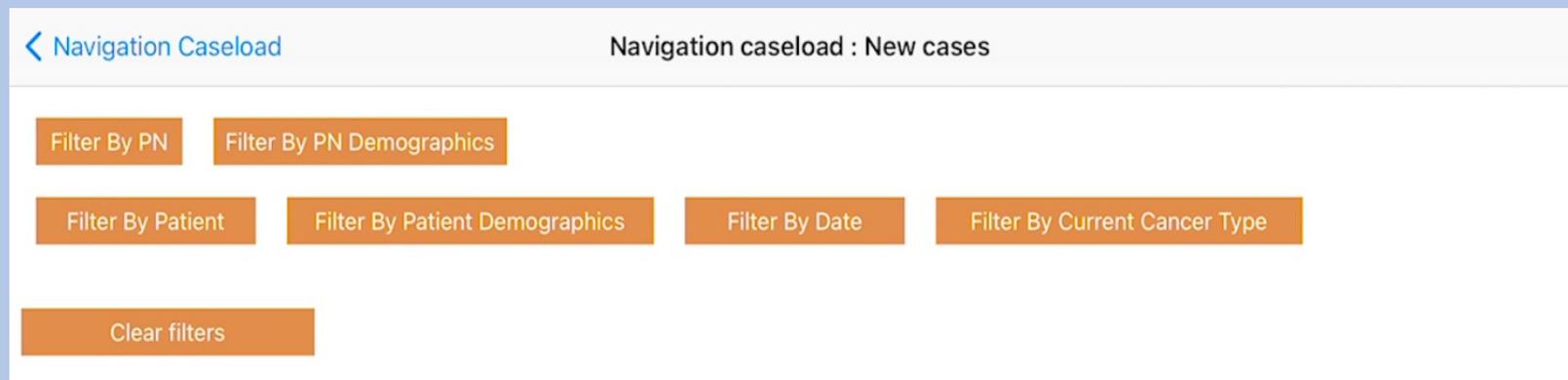
Clinical Trials Education

Patient Education

Patient Retention through Navigation

Default Report Templates: Navigation Load explained

- d. Filters appear (explained in the next section). Of note, although the reports are recommended by multiple national navigation organizations, the Admin still can tailor any report as needed, e.g., for a specific quarter or year, etc.



Default Report Templates: Example of Navigation Load

- d. Navigation Caseloads selected
- e. When select New Cases, all new cases for the program will be shown.
- f. By using the Filter By Date option in this example, 50 new cases were identified between January 31, 2021 through May 31, 2021.

< Navigation Caseload Navigation caseload : New cases

Filter By PN Filter By PN Demographics

Filter By Patient Filter By Patient Demographics Filter By Date Filter By Current Cancer Type

Clear filters

Date:2021-01-31-2021-05-31

Total count 50

Patient ID	Date
NACR0022	2021-05-23
NACR0021	2021-05-22
NACR0020	2021-05-22
sisjsjs	2021-05-18
1111	2021-05-06
061949	2021-05-06
9999	2021-05-06
2345	2021-05-05
NACR 0017	2021-05-02

d Navigation Caseload

- e** New cases
- Open cases
- Closed cases
- Suspended cases
- Deceased cases

Default Report Templates

g. Categories and brief title of each:

g

Navigation Load:

- Navigation caseload(s)
- Clinical trials education
- Patient education
- Patient retention through navigation

Patient Compliance:

- Treatment compliance
- Patient transition from point of entry
- No show rate

Patient Characteristics:

- Demographics (e.g., Best ways to learn)
- Barrier report
- Disparate population at screening event

Referrals (for Patient):

- Clinical trials referrals
- Referrals to revenue-generating services
- Referrals to revenue-generating services by PN
- Cancer screening
- Social support referrals
- Social support referrals for survivors who have completed SCP
- Palliative care referral

Diagnosis & Treatments:

- Diagnosis to first oncology consult
- Diagnostic workup to diagnosis
- Cancer screening follow-up to diagnostic workup
- Completion of diagnostic workup
- Treatment compliance
- Diagnosis to initial treatment
- Patient transition from point of entry

Default Report Templates (continued)

h. Categories and brief title of each:

h

Hospital:

- 30-, 60-, 90-Day readmission rate
- Inpatient oncology unity length of stay
- Emergency department utilization
- Emergency admissions per number of chemotherapy patients

Survey:

- Patient experience / Patient satisfaction with care
- Patient experience / Patient satisfaction with navigation program
- Psychosocial distress screening
- Patient goals
- Survivorship Care Plan
- Transition from treatment to survivorship

PN Characteristics:

- Navigation knowledge at time of orientation
- Oncology navigator annual core competencies review

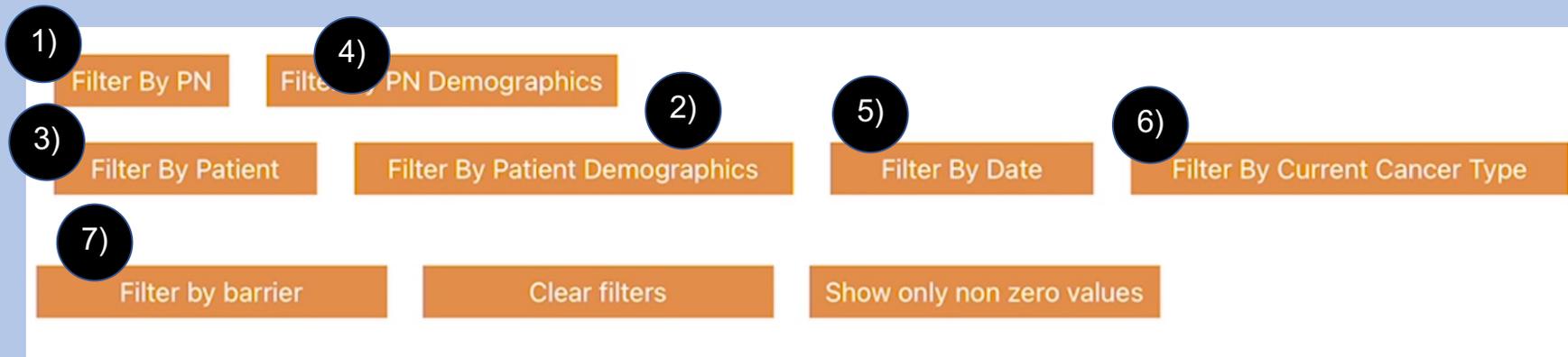
Additional Administration Filters & Reports



Filters for Additional Reports

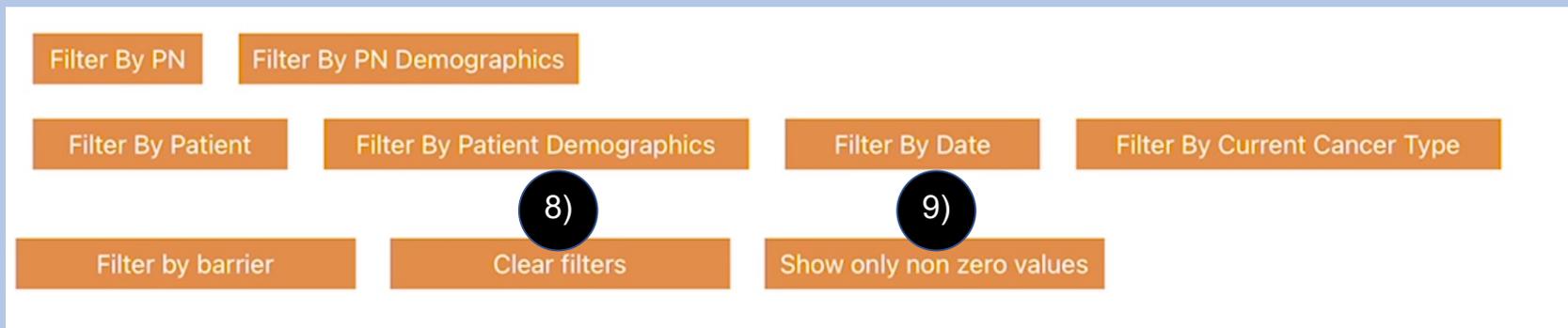
5. Filters allow for customizing/tailoring reports which can be filtered by:

- 1) Patient Navigator(s) (e.g., for specific PN, Kerry, or for multiple PNs)
- 2) PN demographics (e.g., race, level of PN training completed)
- 3) Patient (specific ID)
- 4) Patient demographics (e.g., race, age, education)
- 5) Dates (e.g., quarterly, or between Jan and June; or since 2020, or 2021 only)
- 6) Specific type of cancer (e.g., breast, CRC, lung) or other disease/condition
- 7) Specific Barriers (grouped using National Comprehensive Cancer Network categories (practical, family, physical & emotional); NACI Care© Team added spirituality and culture)



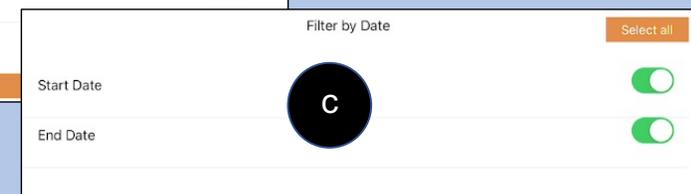
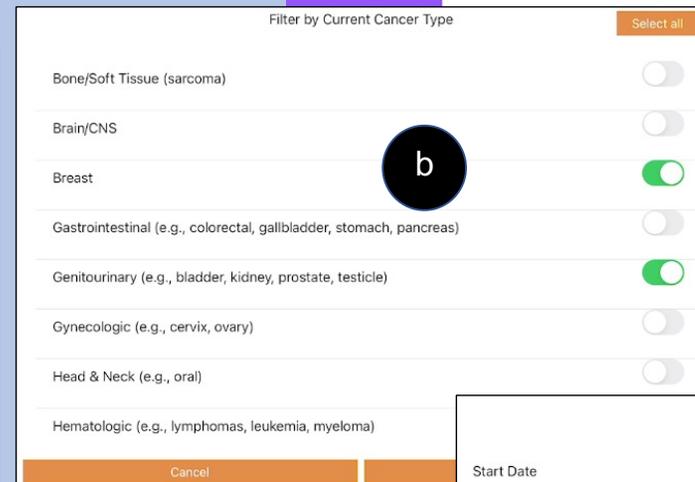
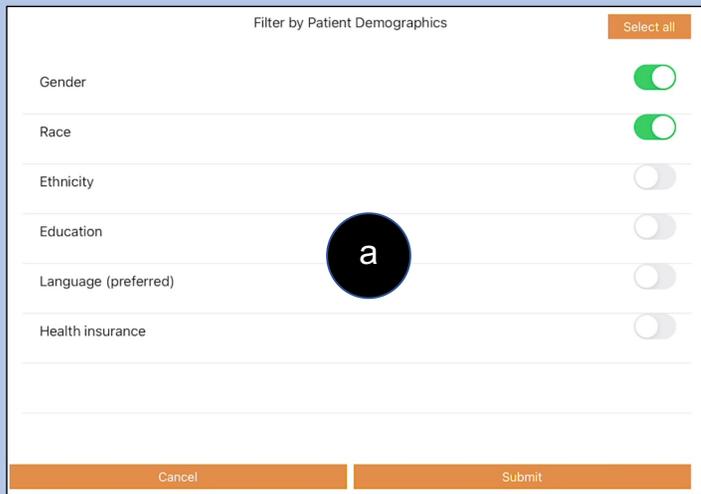
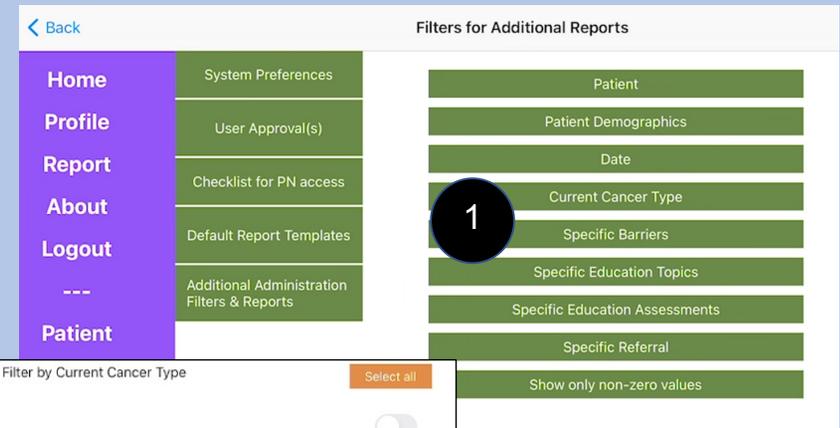
Filters for Additional Reports

- 8) To change filters or start over, select “Clear filters” to remove previous report settings
- 9) “Non zero values” provides a report that only shows categories that include data. When “9)” is NOT selected, the report shows headers for which there are no data. Selecting the button functions like a toggle.



Filters for Additional Reports

1. Select the button(s) to tailor by any filter, e.g., demographics
 - a. Demographic options appear OR
 - b. Limit the report to a specific cancer site
 - c. Options allow for ranges, such as during the last quarter or year



Administrator Checklist Report



PN Administrator's Sidebar – Adm Checklist Report

6. Allows the Admin to see what topics have been selected for PN use

6

Practical Barriers
Financial
Transportation
Family Barriers
Changing family roles and dynamics
Child issues (school; friends)
Communication
Elder issues (dementia; grieving; guilt)
Family health issues (another family members chronically ill)

Adm Checklist Report

1. Reminder: The Adm Checklist report identifies which fields the Administrator wants the PN (or another user) to use
 - a. For example, the Checklist of PN access for Surveys may look like this,
 - b. Limiting the PN to only these four surveys
2. Over time, the Admin may choose to add or remove other topics (by going back to Checklist for PN Access on the Adm Sub-sidebar)
3. Reminder: when the Adm unchecks a topic, the data are NOT lost (contact help.Naci@gmail.com)

Survey		Select all
Overall health	<input checked="" type="checkbox"/>	
Quality of life	<input checked="" type="checkbox"/>	
Behavioral Risk Factor Surveillance System	<input type="checkbox"/>	
Symptom Distress Scale (McCorkle short version)	<input checked="" type="checkbox"/>	
National Comprehensive Cancer Network Problem List	<input type="checkbox"/>	
Patient Goals	<input checked="" type="checkbox"/>	
Self efficacy	<input type="checkbox"/>	
Alcohol consumption survey	<input type="checkbox"/>	

Cancel Submit

Survey	
Overall health	
Quality of life	
Patient Goals	
Symptom Distress Scale (McCorkle short version)	