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™

1. Patient
   - NEW PATIENT
   - 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

2. Patient Navigator (PN)
   - CHARACTERISTICS (PN's personal info)
     - Contact info
     - Demographics
     - Work Site Info
     - Education & Training
     - Outreach
     - Dissemination

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
Patient Navigator (PN) – Home screen

1. Select Patient Navigator to enter personal information
   a. Home screen or
   b. Sidebar
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
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.
4. Select Demographics
   a. Select specific PN demographics and fill in information
      1) For example, sexual orientation

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

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.
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

   Online Instruction
   In-person Instruction
   Combination of online and In-person
   Academic courses
   Tailored Workshop
   Other
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

---

NACI Care™ Tutorial: Patient Navigator (PN) / User
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
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
4. Select Date
   a. Using the calendar roller bar, select the Start Date
   b. Select the End Date

<table>
<thead>
<tr>
<th>Select Start Date for the event</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Month</strong></td>
</tr>
<tr>
<td>February</td>
</tr>
<tr>
<td>March</td>
</tr>
<tr>
<td>April</td>
</tr>
<tr>
<td>May</td>
</tr>
<tr>
<td>June</td>
</tr>
<tr>
<td>July</td>
</tr>
<tr>
<td>August</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Select End Date for the event</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Month</strong></td>
</tr>
<tr>
<td>February</td>
</tr>
<tr>
<td>March</td>
</tr>
<tr>
<td>April</td>
</tr>
<tr>
<td>May</td>
</tr>
<tr>
<td>June</td>
</tr>
<tr>
<td>July</td>
</tr>
<tr>
<td>August</td>
</tr>
</tbody>
</table>

Cancel  | Submit  | Cancel  | Submit
5. Select Timeslot
   a. Use the arrow for pull-down menu of options (including “other” at the bottom)
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
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
9. Location
   a. Select on the text box and keyboard appears. Type or record the name of the location

"park"  parking  parkway
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
10. Number of participants
   a. Select the number of participants attending the event
   b. When the numbers are not shared, make an estimate

<table>
<thead>
<tr>
<th># of participants (may be approximate)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Please select an option</td>
</tr>
<tr>
<td>25</td>
</tr>
<tr>
<td>26</td>
</tr>
<tr>
<td>27</td>
</tr>
</tbody>
</table>
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
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

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”
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
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

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

**Fundraisers**

<table>
<thead>
<tr>
<th>“priz”</th>
<th>prizes</th>
<th>prize</th>
</tr>
</thead>
<tbody>
<tr>
<td>q w e r t y u i o p</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a s d f g h j k l</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Z x c v b n m</td>
<td></td>
<td></td>
</tr>
<tr>
<td>123</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

NACI Care™ Tutorial: Patient Navigator (PN) / User
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
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
Patient Navigator

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
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
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.
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)
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
PN Dissemination

6. Select “Roles”
   a. Use toggle buttons to select roles
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

NACI Care™ Tutorial: Patient Navigator (PN) / User
8. Select “Fundraiser(s)”, then “yes”, if there was fundraising specific to the dissemination activity
   a. Type or record information about the fundraiser
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
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”
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
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
1. Contact help.naci@gmail.com to obtain help when using the PN component within NACI Care™