Practice Administrative Staff Collaborative (PASC)

Implementing Care Navigation

December 2020
Online workshop
Welcome

Lindsay Wallace
Improvement Advisor
Primary Care Improvement Portfolio
Ihub
Workshop Aims

• Support practice teams to set up or review existing care navigation processes rapidly

• provide an overview of the key enablers and priority activities

• outline the essential best practice principles for setting up and monitoring care navigation processes, and

• offer an opportunity to ask questions and access further bespoke support to facilitate the set up or review of care navigation processes
What is care navigation?

The assistance offered to patients and carers in navigating through the complex health and social care systems to overcome barriers in accessing quality care and treatment.

*Macredie et al (2014)*
Why are we here?

- Improve outcomes for patients, families and staff
- GPs to see the patients with more complex needs
- Get through the winter!
- Improve staff morale and job satisfaction
- Increase the skills and confidence of whole practice team
- Make better use of wider MDT and community resources
- Reduce workload on our GPs
How do we get there?

10 Key Steps

01. How ready is your practice for care navigation?
02. What does your team currently know about care navigation?
03. What do patients know about care navigation & local services?
04. What care navigation is already happening in your practice?
05. Who else could you navigate to in your practice and local area?
06. Which services will you start navigating to?
07. How will you navigate safely and effectively to other services?
08. Do your team members have all the skills they need?
09. How will your patients know about your new processes?
10. How will you know if your new processes work for everyone?
Step 1: How ready is your practice for care navigation?

• There never is a “perfect” time to introduce change.

• Assess your readiness, identify your strengths and anticipate your challenges in advance.
Step 1: Key Resource

What’s your current status? Readiness Assessment Tool
Enablers and Barriers

Learning from GP practices in Scotland following successful care navigation implementation

Data source: Information collected from participating practices throughout the Practice Administrative Staff Collaborative prototyping and scale up phases from March 2018 to October 2020.

Enablers

- National messaging
  - NHS Inform – Your Community Health Care Services campaign
- Care Navigation Implementation Support Pack
- Care Navigation in General Practice: 10-Step Guide
- Virtual workshops & coaching

Support for practices

- Collective practice/cluster local knowledge & skills
- GP endorsement and supportive leadership
- Availability of multidisciplinary team members
- Already doing care navigation in practice “informally”

Support for patients

- Promoting care navigation for patients
  - signs and leaflets
  - telephone message
  - information on website
- Guiding patients through the process
  - Initial telephone triage
  - Supportive care navigation
  - Consultation options (e.g., Near Me, face-to-face, asynchronous)

In practice

- Limited staff confidence and skills
- Time available for setup

Barriers

- Reluctance to share personal information
- Lack of awareness of alternative services
- Changes to practice access procedures during COVID-19
- Digital exclusion

Patients

- National messaging
- Care Navigation Implementation Support Pack
- Care Navigation in General Practice: 10-Step Guide
- Virtual workshops & coaching

Why implement care navigation now?

- What is care navigation and why is it important? Click here to learn more.
- How will care navigation help our patients and practice team? Click here to learn more.

Additional resources

- Primary Care Communications Toolkit
- Your Community Health Care Services
- Pharmacy First
- Scotland’s Services Directory
- NHS Near Me user site: https://hec.scot/nearme/
- Remobilising General Practice – Risk Management
Top Tip: Consider The Change Curve

Stage 1: Endings
- Realisation
- Shock
- Confusion

Stage 2: Transitions
- Resistance
- Anger
- Blame
- Defensive
- Searching
- Anxiety
- Uncertainty
- Fear
- Frustration

Stage 3: New Beginnings
- Change accepted
- Commitment
- Enthusiasm
- Trust

Motivation/Performance

Denial
Letting go

Time
Step 2: What do your team already know about care navigation?

- Do the team fully understand what care navigation is?
- Do they have specific concerns about delivering care navigation that need to collectively addressed?
- Do they already think they are doing some care navigation?
- What training would be helpful for them?

**Question**
What do you think your team members might be worried about regarding setting up and delivering care navigation?
Step 2: Key Resource

Care Navigation Staff Questionnaire

Q1. From the following definitions which answer most closely fits your idea of what care navigation means for GP practice administrative staff?

<table>
<thead>
<tr>
<th>Definitions</th>
<th>Tick</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asking clinical questions so you can triage.</td>
<td></td>
</tr>
<tr>
<td>Offering patients the choice of appropriate services which best meet their health needs.</td>
<td></td>
</tr>
<tr>
<td>Asking patients questions to save GP appointments.</td>
<td></td>
</tr>
<tr>
<td>I have no idea.</td>
<td></td>
</tr>
</tbody>
</table>

Q2. From your understanding of care navigation and signposting what do you consider the barriers? Please rank them from most significant to least significant (1 to 5) and if you can think of any others then please add them in the comments box.

<table>
<thead>
<tr>
<th>Barriers</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>(Most significant)</th>
</tr>
</thead>
<tbody>
<tr>
<td>GP and/or Nurse will be annoyed if I get it wrong.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Patients will think they have been fobbed off</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>It is too much responsibility for administrative and/or reception staff</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Patients won’t be willing to tell me what their issue is</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>It will make phone calls with patients too long</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Comments:

Q3. Thinking about the most significant barrier you identified in Question 2, how easy do you think it would be to overcome? Please circle one of the options below:

Very easy  | Moderately easy  | Straightforward  | Not easy  | Impossible

Q4. Do you currently do any care navigation or signposting in your daily role? Please circle one of the options below:

Yes, a lot  | Yes, a bit  | No, never

Q5. From the following types of care navigation and signposting training, please tick all the training you would prefer to receive.

<table>
<thead>
<tr>
<th>Training</th>
<th>Tick</th>
</tr>
</thead>
<tbody>
<tr>
<td>A talk from a trainer</td>
<td></td>
</tr>
<tr>
<td>Role play and scenario-based training</td>
<td></td>
</tr>
<tr>
<td>Shadowing at another GP practice</td>
<td></td>
</tr>
<tr>
<td>Buddy head to hire how a colleague does it</td>
<td></td>
</tr>
<tr>
<td>Online training modules</td>
<td></td>
</tr>
<tr>
<td>Group discussions</td>
<td></td>
</tr>
<tr>
<td>Presentations from third parties, for example pharmacy, physiotherapist</td>
<td></td>
</tr>
<tr>
<td>Optometrists, mental health services and others</td>
<td></td>
</tr>
<tr>
<td>Other training method (please specify):</td>
<td></td>
</tr>
</tbody>
</table>

Q6. To care navigate effectively, what clinical staff do you think you need more information about? Please tick all that apply.

<table>
<thead>
<tr>
<th>Clinical staff</th>
<th>Tick</th>
</tr>
</thead>
<tbody>
<tr>
<td>GP</td>
<td></td>
</tr>
<tr>
<td>Advanced Nurse Practitioner</td>
<td></td>
</tr>
<tr>
<td>Practice Nurse</td>
<td></td>
</tr>
<tr>
<td>Healthcare Assistant</td>
<td></td>
</tr>
<tr>
<td>Dentist</td>
<td></td>
</tr>
<tr>
<td>Optician</td>
<td></td>
</tr>
<tr>
<td>Pharmacist</td>
<td></td>
</tr>
<tr>
<td>Physiotherapist</td>
<td></td>
</tr>
<tr>
<td>Other (please specify):</td>
<td></td>
</tr>
</tbody>
</table>

Q7. Do you have any other suggestions, comments or ideas about care navigation to help us plan how to approach it? Any suggestions welcome!

Comments:

Thank you for completing this questionnaire.

Care Navigation Staff Questionnaire link
Step 3: What do your patients know about care navigation?

Why is this important?

• To give you an idea of which services are well known and by which patient group.
• To help you prioritise which services you need to focus your promotional activity on.

How to consult with patients?

• Use the patient survey from the toolkit.
• Ask members of your Patient Participation Group if you have one.
• Connect with your Community Engagement Officer.
• Ask your GPs what they feel their patients know/understand about care navigation from their experiences during consultations.

Care Navigation Patient Survey
Step 4: What care navigation is already happening?

Take stock

• Do just enough to get an idea of what you’re doing

• use the Care Navigation Tally Sheet to rapidly review your activity either for a whole week (if you have the time) or the busiest day of the week (e.g. Mondays!), and

• draw up a care navigation pathway/flowchart – it won’t take long and is a helpful visual.

This Care Navigation Tally count is juuuuust right!

The Goldilocks Effect
Top Tip: Different ways to count your activity

For a rapid overview

Try the “Fishbowl Count” where the team drop a pebble in a fishbowl every time they have a care navigation conversation with a patient and count them up at the end of the day!

Want more detail?

Teams within the collaborative found the “Week of Care Audit” a helpful resource.

It helps to identify where a patient could have been seen by another service provider first rather than the GP.

Week of Care Audit Tool
Step 5: Who else could you navigate to in practice and locally?

- You may already have a directory
- Check you have a full understanding of available services and access criteria
- Start out with your own Practice MDT
- “Go Safari” and find out what’s available locally
- Use national sources of information including NHS Inform, Scotland’s Services Directory and ALISS
- Consider how you will keep your service directory up to date

Use this Care Navigation Guidelines template to collate the specific service information.
Question: Who are you navigating to right now?

Question
Which services are you currently signposting to?
Step 6: Which services will you start navigating to?

• Review your service directory
• identify priority services
• ensure you liaise with services before you begin navigating
• team members meeting service representatives can make a big difference – “putting a face to a name”, and
• meet the Experts/Speed Dating sessions.
Step 7: How will you navigate safely and effectively?

- Develop a navigation criteria summary (protocol) for each service
- do this as a team taking everyone’s knowledge and expertise into account
- if your local IT allows, upload your criteria directly onto EMIS/Vision, and
- let your indemnity provider know of your new procedures before you begin.
Step 8: Have your team all the skills they need?

• Search the NES TURAS Learn site for learning materials and resources.

• Click here for in-house learning activities and here for external learning resources.
Step 9: How will your patients know about your new processes?

Use a range of ways to get your message across such as:

- A welcoming and informative phone message
- Leaflets and posters
- Notices on your website
- Notices on your social media page
- Local press and radio
- Posters in local centres/shops etc.
- Text messaging

**Question**

What are the top three ways your practice notifies patients of key service information? How else could you advertise your services?
Resources Alert!

- Your Community Health Care Services
- NHS Inform Self Help Guides
- NHS Inform Assets
- NHS Inform GP.scot
- Primary Care Communications Toolkit
- Example Practice Phone Messages
Care Navigation Toolkit

Resources Alert!

Patient Care Advisers

We may be able to help you or suggest other team members who are better placed to deal with your concern.

Gillian
Patient Care Adviser

Welcome to St Luke’s Medical Practice. When you contact our practice by telephone or in person, one of our trained Patient Care Advisers will ask you for some information to help you access the most appropriate member of our practice team. Please share this information with them, and be assured it will remain entirely confidential.

Our Patient Care Advisers may be able to help you or suggest our team members who could deal with your query or concern. These could include:
- Optician or LENS
- Pharmacist or Pharmacy First Severs
- Advanced Nurse Practitioner (ANP)
- Practice Nurse
- Physiotherapist or the self referral MSK service
- Podiatrist
- Dietician
- Nutritionist
- Health Visitor
- Treatment Room
- Minor Injuries Unit
- Occupational Therapist

All Practices throughout Clydesdale are working together, collaboratively to improve patient care and access to services. We are working as part of a national Scottish project by Health Improvement Scotland called PAMPC. It is a ground-breaking initiative aimed at improving the patient experience in primary care whilst supporting practice teams to work collectively to meet their patient needs. By directing your care to the most appropriate person at the most appropriate time this will help to free up valuable GP time to help those patients with more complex needs.

Who Do You Need An Appointment With?
At BIGGAR Medical Practice we are committed to navigating your care to the most appropriate person at the most appropriate time.

- Store ordering lines 0333 800 3738 or text advice to 85085
- Weight Control Team (Weight Loss Centre) 01646 660 819
- Advice on Medication
- Minor Injuries
- Eye, Ear, Nose and Throat
- Emergency Care Appointments
- CONTACT YOUR LOCAL PHARMACY

- Smoking cessation
- Healthy Lifestyle support
- Health checks and vaccination
- Referral to a dietitian

BSS Healthline
- Community Rehabilitation Team
- Mental Health Support
- Service Users’ Support Group
- Self Care Advice
- Healthline 0800 853 6771

Clydesdale and Dumfriesshire Health and Social Care Partnership

- Operations and Referral: 0800 555 3776
- Information Services: 0800 555 3776
- Elderly and Mental Health Services: 0800 555 3776
- Community Health and Social Care Services: 0800 555 3776
- Healthline: 0800 555 3776

- For urgent general practice (GP) services: Dial 111 or call 01646 660 819
- For urgent specialist services: Dial 111 or call 01646 660 819
Step 10: How will you know your new systems work for everyone?

- Care navigation is an ongoing process
- Consult regularly with internal team members, external community colleagues and patients
- Safety is essential
- Revisit your patient and staff surveys 30-day Review Template – for rapid review of activity, data and progress, and
- Finally, celebrate your success!
Let’s recap

10 Key Steps

01. How ready is your practice for care navigation?
02. What does your team currently know about care navigation?
03. What do patients know about care navigation & local services?
04. What care navigation is already happening in your practice?
05. Who else could you navigate to in your practice and local area?
06. Which services will you start navigating to?
07. How will you navigate safely and effectively to other services?
08. Do your team members have all the skills they need?
09. How will your patients know about your new processes?
10. How will you know if your new processes work for everyone?
Next Steps

Get in touch if you:
• Have a question
• Want more follow-up support
• Want to connect and learn from others
• Want to share your success

Email: his.pcpteam@nhs.scot
Thank you for joining us

Thank you for your time and good luck!
Please keep in touch:
his.pcpteam@nhs.scot