

Appendix Navigator Script



This is an example from ARC program. Please adapt it for your setting

Initial encounter

Introductions

- 1) **Bonjour, Hello. Préférez-vous avoir notre discussion en Français-** or do you prefer to continue in English?
- 2) My name is _____ and I'm a Patient Navigator working with your doctor's team.
 - Ask the patient: *"What is your mother tongue?"* (English, French, Another Language: Specify)
 - *"If your mother tongue is not French or English, which of Canada's official languages are you most comfortable?"* (English, French). If the patient requires service in another language, inform them that you will return the call and seek the assistance of a cultural interpreter.
 - *"In which of Canada's official languages do you feel more comfortable receiving health care services?"* (English, French)
 - Document the patient's language of preference for health care and their preferred language of communication in a social setting in the Navigator Log.
- 3) My role is to help you find (and get to) the services that are best for you, based on the health goals that you and your doctor identified together.
- 4) I'd like to start by explaining what I can do as a Navigator. **I can assist you with things like:**
 - a. Help with understand what a *community resource* [CR] can do for you.
 - b. Help you identify the best [CR] for you (preferably in your area).
 - c. *Depending on apparent social challenges experienced by the patient...*

Assist you with organizing your travel planning/transportation (by car or bus) as well as assist you in make the appointment (and alternate phone calls) if needed.

Essentially, I am here as a support to help you gets to the resource(s) in order for you to receive the available and relevant services offered.

There are a few limits of what I cannot do as a Navigator:

I won't be able to counsel or give you any medical advice, as I am not a health care provider.

EXCLUSIVE TO PHONE CONVERSATION WITH PATIENT

Do you have a few minutes now to discuss this over the phone or would you prefer to meet in person to review this together?

- If yes, proceed to the next section

- *If no, establish the time and method of the next contact. You may offer to meet the patient at the practice. Close the discussion with a confirmation of the next contact.*

Overview of the Referral

1) *While presenting the doctors faxed referral – or noted down information about this document*

Would you be able to tell me about the type of [CR] you and your doctor spoke about during your last visit?

a. Did you explore services/resources for the presenting [CR] with your doctor?

If the patient doesn't seem to understand the reason for the referral, prompt with:

Did your doctor give you any reasons about why a [CR] would be important for your health?

b. Initial

If applicable (e.g. for diabetes):

Do you have any questions about the different TYPES of resources available for _____?

c. Did your doctor suggest any specific [classes, groups, programs...] relevant to this [CR]?

d. Do you already have an idea of a specific [class, group, program...] that you were interested in?
Or one that you might want more information about?

2) Generally speaking, what are you hoping to get out of such a [CR]?

Exploring Potential Barriers

1) Can you think of any reason(s) why it might be difficult for you to access and/use this [CR]?

May need to PROVIDE EXAMPLES: not enough time, transportation concerns, etc.

2) Can you tell me about any preferences or limitations you may have, when it comes to choosing the [CR] that is best for you?

3) Summarize and repeat the barriers/issues raised (to ensure your understanding and reinforce the patient's awareness)

4) Is there anything that you think I should know about you/your health, to help me find the right resource for you? (i.e. preferences, things to avoid)

Planning for Action

1) *If still during the first contact, assess if it is still feasible to proceed:*

Do you have a few minutes now for us to look at the options together?

a. *Proceed to doing the search on 211, using the criteria provided, explicitly stating these as you enter them in the system.*

b. When the resource has been found,

i. Offer to make the appointment

ii. Address any barriers that were raised by the patient

If not (if the navigator needs more time to research),

1) I can do a little bit of work and get back to you with some options in a maximum of ___ business days (try to stay around 2 days). Does this sound feasible?

2) Establish the time and method of the next contact. You may offer to meet the patient at the practice but usually a phone call is preferable. you can also mail out any relevant forms of paper-copy information to the patient at this later time.

Wrap –Up & Next Steps

1) Close the meeting with a summary of actions you have taken and actions that you and the patient plan on taking. Provide an e-mail or printed summary of next steps (if the patient requires it).

2) Inform the patient of 211, provide them with promotional material (usually a pen, note pad and/business card). emphasize that simply dialling 211 gives them access to over 7000 resources.

If the patient seems interested and wanting to know more about 211:

a. I'd be happy to guide you through an example of how to conduct an online search.

b. If this isn't a good time for you, we can plan to meet to go over 211 at another time.

c. If you're not comfortable using the Internet, there is also has a phone helpline. Simply dial 2-1-1.

Providing Resources – First follow up

The Navigator will provide the patient with information on the [CR] within **three business days** following the initial patient encounter. The means by which this information will be communicated to the patient will be established during the initial meeting (e.g. by e-mail, telephone, mail, second in-person appointment, etc.)

Telephone

The Navigator will call the patient to inform them of the available resources, providing them with the description of services, contact information, location, and additional online information if available. The Navigator can then offer to send the patient an e-mail or mail them a hard copy of the information. The patient will also be made aware that this information will be given to their provider, should they misplace it or need it in the future.

- 1) Call patient during the available time of day
(*indicated on the original referral form from provider*).
- 2) Provide patient with resources that you found. Ask them their thoughts on these (is this something of interest?)
 - a. Can I help you with anything else (i.e. to make an appointment, to fill out a form, to make a phone call, etc.)?
 - b. Was there anything else that you needed from me at this time?
 - c. Do you have any further questions about anything?
- 3) I would like to set up a follow-up phone call in two weeks to see how you are doing and if you have made progress with the [CR] and to see if there is anything else I can do to help.
 - a. Set up a day & time for the phone-call in approximately 2-weeks' time from the present day.
 - i. If you prefer, I can follow-up with you via e-mail?
 - ii. We can also schedule another meeting with your doctor so you can ask him/her those questions that I was not able to answer for you.
 - iii. If you are not comfortable finding a [CR] and making an appointment on your own, I'd be happy to help you with that.
 - b. Flag or set up a reminder in your calendar in order to remember to call back/email this patient.

- 4) Remind the patient of the Ontario 211 resources, and tell them that they can call this line at any time of day for any questions relevant to resources in their area.

E-mail

The Navigator will e-mail the patient the Word document or website link containing resources. It is important (as noted in bold, below) that the patient confirms receipt on the Navigator's e-mail correspondence. If the patient does not e-mail the Navigator within **five business days**, from when the initial contact, the Navigator will then call the patient to confirm their reception of this e-mail.

*“Hello [patient name],
It was very nice meeting you. I am writing to follow-up on our discussion of potential [CR]. Please find attached a list of suggested resources found for the needs that we discussed during our meeting on [date and location]. I will be following up with you by [e-mail/phone –based on the patient’s indicated preference during initial encounter] on [date/ten business days] to see how things are going.*

I’d ask that you please reply to this e-mail in order to confirm that you have received it. In the meantime, please don’t hesitate to contact me by e-mail or telephone if you have any questions or concerns”

[Navigator electronic signature]

2-week Follow-Up

The Navigator's first follow-up is scheduled at the end of the initial encounter between the Navigator and the patient. Some patients require a quicker follow-up (within a few days, or within a week), but most agree to have the Navigator follow-up after two weeks, either by telephone or e-mail.

- 1) Call patient during the available time of day (*indicated on the original referral form from provider*).
- 2) Start by asking the patient how they are doing overall, and following-up on the assigned resources.
 - a. Have you been able to reach ____; have you been able to access ____? (*based on the next steps you had scheduled for the patient*)
 - b. Based on their response:
 - i. If the patient has accessed the [CR], ask them how they are finding it? Are there any further barriers getting in the way? Is there anything else you can do to help? If the patient is content, thank them for their participation and wish them well with the [CR].
 - ii. If the patient has not accessed the [CR], ask them why? (this could be due to a lack of motivation and/or to alternate barriers in the system (i.e. wait list, no one answering the phone at the [CR], fear of making a phone call, etc.). Ask the patient if there is anything you can do to help them? Let the patient

know that you will look into further resources (should the need be).

- 3) Remind the patient of the Ontario 211 resources, and tell them that they can call this line at any time of day for any questions relevant to resources in their area

Example

a. Telephone

If Patient Answers

“Hello, may I please speak with [patient name]? This is [name], the ARC Patient Navigator. I am calling to follow-up on the resource(s) that I provided you with two weeks ago.

Have you had the chance to access it/them?”

i. If the patient has accessed the resource(s)

“How did it go? Did you have any difficulties getting connected to the resource? Did I tell you about 211? Do you now feel confident to find resources for yourself in the future using 211? If you require any further help just ask your provider to make another referral and I would be happy to help you. It has been a pleasure – Goodbye”

ii. If the patient has yet to access the resource(s)

“Is there anything that made it difficult in accessing this/these resource(s)? Is there anything I can do to help you access this resource? Do you still feel comfortable with this resource or would you like for me to look into any alternatives?”

Whether the patient has accessed the resource(s) or not, the Navigator will follow-up a second time in the **next five to ten business days.**

If Patient Does Not Answer

“Hello [patient name], this is [name], the ARC Patient Navigator. I am calling to get an update on the resources that I provided for you on [date]. I would like to know how things are going and see if these resources are the right fit for you. Please call me back at your convenience at [613]. Please feel free to leave a detailed message with the best time and date to call you back. I look forward to hearing from you. Thank you.”

b. E-mail

“Hello [patient name], I hope you are doing well. I am writing to follow-up on the resource(s) that I provided you with on [date] with regards to [priorities on referral form and any additional needs brought up by the patient].

As a reminder, here is a list of the resources we had discussed:

- *[List needs and associated resources]*

Would it be possible for you to please let me know if you were able to access this/these resource(s). If yes, can you tell me how it went? If not, can you tell me the reason(s) why you haven't been able to access it/them yet?

ARC: [Access to Resources in the Community](#)/[Accès aux Ressources Communautaires](#)

If by chance, these resources were not quite what you were looking for, please let me know and I would be happy to search for (an) alternative resource(s) that would better suit your needs.

Please reply to this e-mail or give me a call whenever convenient for you.

Should you get my voicemail, please feel free to leave a detailed message and let me know when the best time is to call you back. Looking forward to hearing from you.

[Navigator's Signature with contact information]

Potential Scenarios:

If the patient requires further information or help with accessing a resource

The Navigator will plan further research into alternate resource(s) and/or help with any other navigation activities that could be beneficial to the patient (e.g. filling out forms, booking appointment, researching new [CR], etc.). The Navigator will follow-up with the patient within **two to three business days** of the follow-up contact by taking action on any further navigation activities that were requested by the patient.

Once the activities have taken place, and/or the new resource(s) has/have been provided to the patient, the Navigator will once again schedule a follow-up contact with the patient in **two weeks/ten business days**. The same follow-up process will take place until the patient and the Navigator have addressed the barriers or limitations to patient access recommended resource(s).

If the patient needs more time to look into resource(s) provided

The Navigator will inform the patient that they contact them in a week's time. This allows an opportunity for the patient to take the necessary steps to look into the resource and identify any questions or concerns.

If the patient does not respond to the follow-up

The Navigator has tried contacting the patient and was not able to get through to them (by telephone through voicemail, or by e-mail and no reply). If a voicemail was left to follow-up on the resource(s), the Navigator will contact the patient again in another **five business days**.

2nd Follow-up

After **five business days** from the initial follow-up, if the Navigator has still not heard from the patient, another contact will be made by the best means of contact (i.e. e-mail or telephone).

a. Telephone

If the patient answers – the same script as the initial follow-up should be used. (Section 6.a. **If Patient Answers**). If the patient does not answer, the Navigator will leave a detailed voicemail. (see Section 6.a. **If Patient Does Not Answers**)

b. E-mail

The Navigator should forward the e-mail correspondence sent to the patient at follow-up #1 (see Section 6.b.) and add the following information:

*“Hello [patient name],
I am writing to follow-up on my original e-mail (below), to ensure that you have received my correspondences as I have yet to hear back from you. It is important for me to know if you have in fact received this information and to ensure that you have the resources you need to benefit you.*

Kindly let me know that you have received this e-mail. Thank you.

(Navigator’s Signature)

(Optional): If the Navigator is not able to reach the patient after two attempts:

At this time, it is the discretion of the Navigator to decide whether or not to communicate with the patient’s provider through an interim feedback form that is sent by fax. The following message could be communicated:

“Navigator followed-up with patient by [means of communication] on [dates]. Should you wish to provide any alternate means of communication with this patient or have any further detail or updates on her current situation, please communicate with me through fax or e-mail [Navigator e-mail address]. Thank you.”

3rd Follow-Up

IF UNABLE TO REACH PATIENT AT THIS TIME, THE PATIENT IS NOW DISCHARGED (EITHER THROUGH VOICEMAIL OR E-MAIL, IF NO TELEPHONE CONTACT AVAILABLE – REFER TO SECTION 7 FOR DISCHARGE PROCESS AND SCRIPTS).

Discharge / End of Navigation Services

The end of the navigation services takes place when either of the following two scenarios occur:

Scenario #1: Telephone

If the patient answers the call:

“Hello, this is [name of navigator], the ARC Patient Navigator. I am calling to follow-up on how things are going and to make sure that you have everything you need in order to move forward with the resource(s) that I provided you with on [date] with regards to [priorities on referral form and any additional needs brought up by the patient].

Do you require any further information on these resources?
[Provide any additional information, if requested]

In the future, if you need any further assistance with regards to new priorities, please get in touch with your provider, who would then be able to refer you back to the ARC research team for further assistance – all the information I have provided you with was also given to them. You can also reach out to 211 by telephone to help you find additional resources in your area, free of charge. Now, how comfortable would you say you feel in accessing this type of [CR] independently? [**Write down patient answer in Navigator log**]

If the patient does not answer, leave the following voicemail:

*“Hello [**patient name**], this is [**name of navigator**], the ARC Patient Navigator. I have made a few attempts to contact you in order to follow-up on your progress with the resources that I provided you with on [**date**].*

Should you require any further assistance with regards to new arising priorities, please do get in touch with your provider, who would then be able to refer you back to the ARC research team for further assistance – all the information I have provided you with was also given to him/her. You can also reach out to 211 by telephone to help you find additional resources in your area, free of charge.

Scenario #2: E-mail (if no telephone option available at this time)

*Hello [**patient name**], I have attempted to reach you by [**means of communication**] over the last several weeks. Unfortunately, I was not able to get in touch with you. I hope that the resources I provided you with were helpful. Should you wish to receive more information or have questions about the resources or the program, please check-in with your provider as they were provided with a copy of the resources (that I am also attaching here for you).*

Thank you once again for your time and participation in the ARC study. All the best to you.

[Navigator Signature and contact information]