



#pasc

# Practice Administrative Staff Collaborative (PASC)

## Implementing Care Navigation

December 2020  
Online workshop



# Welcome



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# 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



# Care Navigation: Operational Definition

## 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?



# 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

This tool uses a traffic light system to help you determine whether your GP practice is ready for care navigation. Once completed please look at the colours of your answers and use the key below to find out if you are ready for care navigation.



If the majority of your answers are GREEN, your GP practice may already have started care navigation and you are ready to expand this work, or your GP practice is ready to start the work.



If any of your answers are ORANGE, you need to consider these points when approaching the work.

It doesn't mean you shouldn't start, but that you need to be mindful of resources, establish further relationships within and outwith the GP practice team and consider staff training before you start the work.



If any of your answers are RED, your GP practice may not be ready for the work.

You should consider all of the red areas before starting any care navigation work.

To find out if your GP practice is ready for care navigation, please tick YES  or NO  to the following questions.

Do you have an extended Multidisciplinary Team (MDT) within the GP practice now or joining the practice in the near future?

YES  NO

Do you have an established Practice Manager or GP cluster network?

YES  NO

Do you currently have any unfilled admin or reception staff vacancies?

YES  NO

To find out if your GP practice is ready for care navigation, please tick YES  or NO  to the following questions.

Do you have high levels of sickness absence?

YES  NO

Do you have a method to regularly communicate changes to all staff within the GP practice?

YES  NO

Do your staff feel nervous taking on new responsibilities?

YES  NO

Do your staff understand what care navigation is?

YES  NO

Are staff competent and or confident in asking patients for more appointment detail?

YES  NO

Are you able to gather data on current care navigation that takes place within the GP practice?

YES  NO

Do you currently direct patients to other services?

YES  NO

Are your GPs stressed and struggling with demand?

YES  NO

Do your GPs like to see every patient requesting an appointment with them?

YES  NO

Do your GPs have an appetite to implement care navigation?

YES  NO

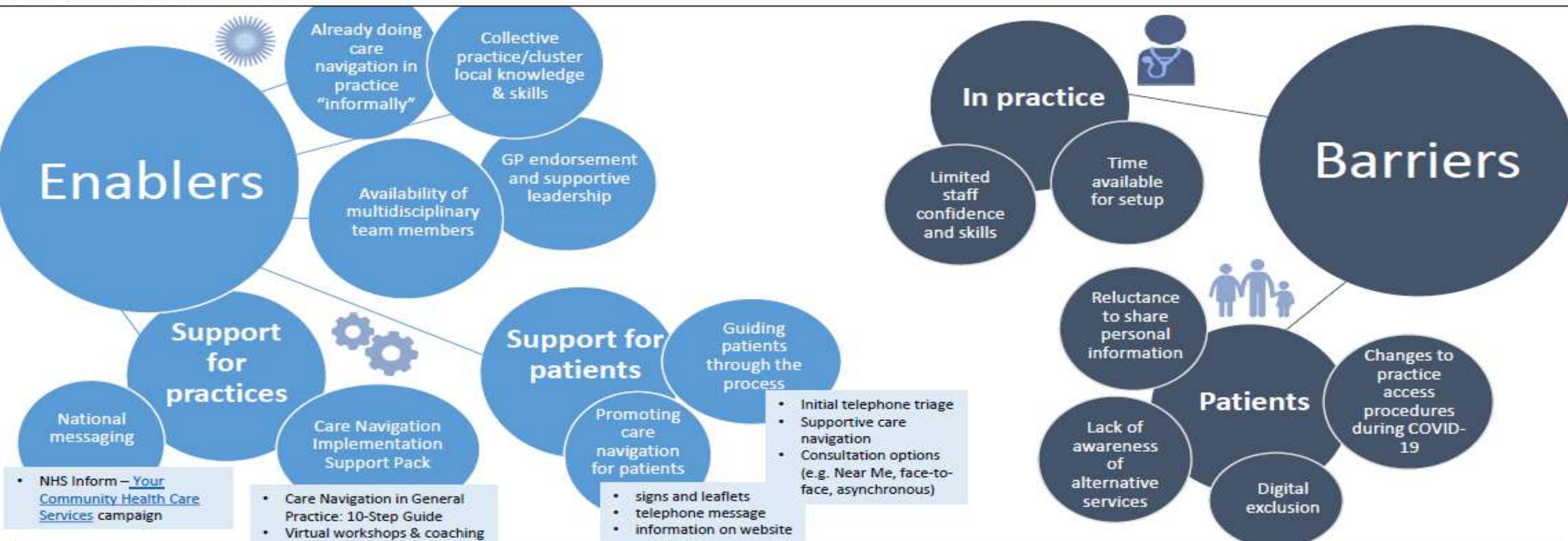
What's your current status? [Readiness Assessment Tool](#)



# 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.



### Why implement care navigation now?

### Additional resources

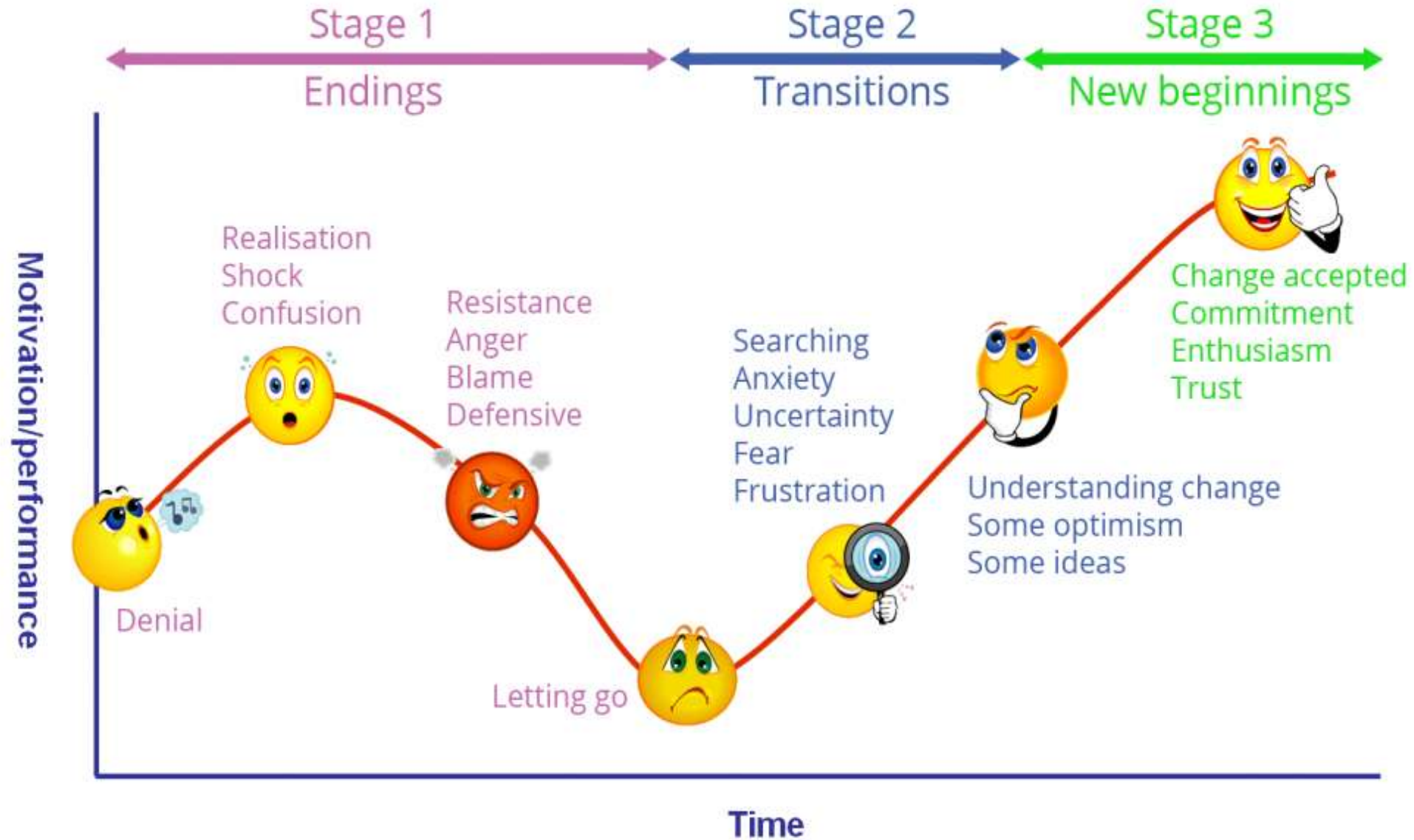
- \* What is care navigation and why is it important? Click [here](#) to learn more.
- How will care navigation help our patients and practice team? Click here to [learn](#) more.

- [Primary Care Communications Toolkit](#)
- [Your Community Health Care Services](#)
- [Pharmacy First](#)

- [Scotland's Services Directory](#)
- NHS Near Me user site: <https://tec.scot/nearme/>
- [Remobilising General Practice – Risk Management](#)



# Top Tip: Consider The Change Curve



# 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 be 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?

QUESTION



# 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?

| Definitions  | Tick |
|--|------|
| Asking clinical questions so you can triage.   |      |
| Offering patients the choice of appropriate services which best meet their health needs. |      |
| Asking patients questions to save GP appointments.                                       |      |
| I have no idea.  |      |

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

| Barriers  | 1-5<br>(1 most significant) |
|---|-----------------------------|
| GP and or Nurse will be annoyed if I get it wrong                       |                             |
| Patients will think they are being fobbed off                           |                             |
| It is too much responsibility for administrative and/or reception staff |                             |
| Patients won't be willing to tell me what their issue is                |                             |
| It will make phone calls with patients too long                         |                             |

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 and 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.

| Training   | Tick |
|--|------|
| A talk from a trainer  |      |
| Role play and or scenario based training   |      |
| Shadowing at another GP practice   |      |
| Buddy headset to hear how a colleague does it  |      |
| Online training modules  |      |
| Group discussion   |      |
| Presentations from third parties, for example pharmacy, physiotherapist, optician, mental health services and others |      |
| Other training method (please specify):  |      |

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

| Clinical staff              | Tick |
|-----------------------------|------|
| GP                          |      |
| Advanced Nurse Practitioner |      |
| Practice Nurse              |      |
| Healthcare Assistants       |      |
| Dentist                     |      |
| Optician                    |      |
| Pharmacist                  |      |
| Physiotherapist             |      |
| Other (please specify):     |      |

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.

**Patient Awareness Questionnaire**

Primary care services are changing. We would be grateful if you could answer the following few questions to allow us to plan how to keep you informed and involved. Please circle 'yes' or 'no'. All comments welcome.

| Age (please circle)   | 0-18  | 18-24 | 25-34    | 35-44 | 45-54    | 55-64 | 65+ |
|---|---|-------|----------|-------|----------|-------|-----|
| Did you know your GP practice has the following services available?   | Service   |       | Aware    |       | Comments |       |     |
|   | Advanced Nurse Practitioner   | Yes   | No       |       |          |       |     |
|   | Practice Nurse  | Yes   | No       |       |          |       |     |
|   | Mental Health Nurse   | Yes   | No       |       |          |       |     |
|   | Practice-based Pharmacist   | Yes   | No       |       |          |       |     |
|   | Physiotherapy Practitioner  | Yes   | No       |       |          |       |     |
| Where do you go to find information about local GP services?  | Where   |       | Comments |       |          |       |     |
|   | Local print media   |       |          |       |          |       |     |
|   | Social media  |       |          |       |          |       |     |
|   | National TV   |       |          |       |          |       |     |
|   | Waiting room screen/posters   |       |          |       |          |       |     |
|   | Other (please specify):   |       |          |       |          |       |     |
| If you had a query or concern about your health, would you use any of these services as your first port of call?              | Eye problem: Optician   | Yes   | No       |       |          |       |     |
|   | Teeth/gum/mouth concern: Dentist  | Yes   | No       |       |          |       |     |
|   | Joint/muscle problem: MSK helpline  | Yes   | No       |       |          |       |     |
|   | Medication query: Pharmacy  | Yes   | No       |       |          |       |     |
|   | Urine infection: Pharmacy   | Yes   | No       |       |          |       |     |
| Comments or examples:   | Conjunctivitis/Impetigo: Pharmacy   | Yes   | No       |       |          |       |     |
|   | Reception staff may ask you some brief questions to make sure you see the right person or service. Would you be happy to provide brief information to the receptionist? |       | Yes      | No    |          |       |     |
| Are you aware that self-care and health advice is available from <a href="http://www.nhsinform.scot">www.nhsinform.scot</a> ? |   | Yes   | No       |       |          |       |     |
| What matters to you when you have a health question or concern?   |   |       |          |       |          |       |     |
| Any other comments:   |   |       |          |       |          |       |     |

Thank you for completing this questionnaire.

[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 juuuust right!



# 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.

PEOPLE WILL FORGET  
WHAT YOU SAID,  
PEOPLE WILL FORGET  
WHAT YOU DID, BUT  
PEOPLE WILL NEVER  
FORGET HOW YOU  
MADE THEM FEEL

MAYA ANGELOU



# 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](#)



## GP – Senior Partner

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 Service
- Advanced Nurse Practitioner (ANP)
- Practice Nurse
- Physiotherapist or the self referral MSK service
- Podiatrist
- Dietician
- Midwife
- Health Visitor
- Treatment Room
- Minor Injuries Unit
- Occupational Therapist



Dr J Stewart

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 PASC. It is a ground-breaking programme 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.

# Resources Alert!

## Patient Care Advisers

Please do not be offended when we, as Patient Care Advisers, ask you for a brief description about why you are contacting the practice. This helps us to navigate your care. We are able to help you access the most appropriate person at the most appropriate time and all information remains entirely confidential.

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

- Optician or LENS
- Pharmacist or Pharmacy First Service
- Advanced Nurse Practitioner (ANP)
- Practice Nurse
- Physiotherapist or the self referral MSK service
- Podiatrist
- Dietician
- Midwife
- Health Visitor
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- Occupational Therapist

Dr J Stewart  
Dr J Boyd  
Dr S Gemmill  
Dr L Macdonald  
Dr V Jack  
Dr MC Hughes



Gillian  
Patient Care Adviser

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## BIGGAR Medical Practice

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.



# Care Navigation Toolkit

# 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



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How ready is your practice for care navigation?

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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](mailto: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](mailto:his.pcpteam@nhs.scot)

THANK YOU

