CARE NAVIGATION IN GENERAL PRACTICE: 10-STEP GUIDE

Introduction

To support resilience in primary care services during COVID-19, we developed this 10-step guide to support general practices to implement safe and effective care navigation processes. Care navigation makes the best use of GP practice and wider primary care resources to help patients be seen by the right person, at the right time and in the right place. Effective care navigation increases GP capacity and improves outcomes and the overall care experience for people, families and staff.

Background

Since March 2018, the Practice Administrative Staff Collaborative (PASC) has worked with over 200 practice across Scotland to develop, test and scale up safe and effective care navigation processes within GP practices using quality improvement methods and shared learning opportunities. This guide brings together the key processes, resources and insights developed through PASC's work into one document. It is designed to support practice teams to either set up their care navigation processes or rapidly review existing processes to improve patient outcomes and sustain practice resilience and sustainability.

About this resource

Setting up care navigation processes in your practice is straightforward and this guide outlines the essential steps required. For further details about the support available email: his.pcpteam@nhs.scot.

The guide **also signposts to a series of other related materials produced by our national partners** including Scottish Government, NHS Scotland, Public Services Delivery Scotland, NHS Inform and NHS Near Me. For **the full Care Navigation Toolkit** click on this link.

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?

Healthcare Improvement Scotland

CARE NAVIGATION IN GENERAL PRACTICE: 10-STEP GUIDE

01 How ready is your practice for care navigation?

- There may never be a perfect time to introduce a new way working but the benefits of introducing care navigation are significant and worth the effort - click here to learn what care navigation is and here to see how it can make a difference.
- Use the Readiness Assessment template to identify any possible barriers to getting started, then review the Enablers & Barriers document for ideas and resources to help you quickly overcome any immediate obstacles, or try brainstorming your own solutions using this Brainstorming Guide.

- Readiness Assessment
- Enablers and Barriers
- How to Brainstorm Solutions and Achieve Consensus

02 What does your team currently know about care navigation?

- Check in with your team members and clarify their current understanding of care navigation and confidence in doing it.
- They may need further support and development which can be delivered in a range of ways (see Step 7 for more details)
- At this stage, it is important to emphasise that care navigation is not the same as clinical triage.

- Care Navigation Staff Questionnaire

03 What do patients know about care navigation & local services?

- It's important to understand what your patients know about the services available to them both inside and outside the practice.
- This will help you make decisions around which services you choose to care navigate to and how.
- Use the Patient Survey to gather feedback – you can use hard or electronic copies to best suit your patients' needs (and in line with current COVID-19 restrictions).

- Patient Survey.
- When possible, ask patients to fill out the survey while in the waiting room.
- Alternatively, email the survey, post on your website or social media platform.

04 What care navigation is already happening in your practice?

- There is no 'one-size fits all' approach to care navigation and your processes need to fit your local context.
- You may already be doing more care navigation than you realise.
- Use this tally sheet to count who you are already navigating to. If time allows, complete the count over a full week or select a known busy day (such as a Monday) to get the best indication of your current care navigation activity.
- Next, create your own flowchart to map out your current or future care navigation pathways - this example flowchart will help you get started.

- Care Navigation Tally Sheet
- Care Navigation Flowchart Example

05 Who else could you navigate to in your practice and local area?

- Remember to include services and professionals from both inside and outside your practice and find out **what** services they deliver, **how** they deliver them and **when** so that you can offer patients accurate advice and guidance.
- Invest the time to have conversations with your partner professionals and services to develop your care navigation pathways – click here for sample Care Navigation Guidelines templates you can use to fact find about your local services and develop your own local guidelines for your reception team.
- More information about services in your local area is available on NHS Inform's Scotland's Service Directory

- Care Navigation Guidelines Template
- Scotland's Service Directory

Healthcare Improvement Scotland

CARE NAVIGATION IN GENERAL PRACTICE: 10-STEP GUIDE

06 Which services will you start navigating to?

- Having worked through Step 4 you should now know which services are available in your area. This knowledge will help you prioritise which services to navigate to.
- It may be easier to begin by prioritising the most frequently accessed services first, to allow staff and patients time to adjust to this new way of working.
- All team members can benefit from meeting with your partner services to build relationships and awareness of services.

- You need to have professional links with service providers
- A meeting or call to discuss how best to collaborate is essential.
- 'Meet the Expert' sessions to connect with local providers can be helpful.

07 How will you navigate safely and effectively to other services?

- For each service you want to navigate to, you will need to develop a navigation criteria summary for your administrative team to follow. This is the same template you used to find out about your local services so the work is nearly done.
- The criteria should be completed with the clinical professional, the Practice Manager, a receptionist and ideally a GP.
- If your IT systems allow you can link these criteria summaries to your EMIS template or Vision guidelines.
- It's recommended you contact your indemnity provider and notify them of your new processes before you get started.

- Care Navigation Guidelines Template
- Pharmacy First Practice Guidance
- Primary Care Communications Toolkit

08 Do your team members have all the skills they need?

- Use a blend of existing practice expertise, wider local collaboration and national support to meet the needs of your team.
- Use the skills and experience within your whole team and wider community to develop your own in-house opportunities for learning and sharing.
- Consider any gaps team members may have in their 'softer skills' too, such as communication, active listening, handling difficult conversations – search the NES TURAS Learn site for learning materials and resources

- In-Practice Learning & Communications
- External Training Providers
- NES TURAS Learn

09 How will your patients know about your new processes?

- To avoid confusion and provide reassurance, communicate your new care navigation procedures to patients effectively.
- Ensure you agree a start date with your selected services so they can anticipate any change in demand and plan ahead.
- It may take time for your patients to understand why things have changed - understanding and patience will support this.
- If your patient does not wish to be navigated elsewhere, always offer them access to a GP – this is their choice.
- Use a range of different ways to get your message across to maximise reach and uptake.

Example practice phone messages

- Display NHS Inform key patient guidance about service provision on practice notice boards, social media and websites.
- Example posters 1, 2 & 3 to use to develop your own customised patient notices.

10 How will you know if your new processes work for everyone?

- Care navigation is an ongoing process and there should be regular reviews and updates on progress and processes.
- Remember to consult regularly with internal team members, external community colleagues and patients to ensure your processes are working for everyone involved.
- Safety is essential, so if ongoing issues arise or you anticipate any safety concerns, review and revise your plans immediately.
- And finally, remember to celebrate your success and the difference it has made for your patients, partners and team members.

Identify team members to review, test and update your care navigation framework.

- Use check-in questionnaires with your patients and team members to gather feedback.
- Use this review template to reflect on your activity and continuously improve.

Published December 2020

This document is licensed under the Creative Commons Attribution-Noncommercial-ShareAlike 4.0 International Licence. This allows for the copy and redistribution of this document as long as Healthcare Improvement Scotland is fully acknowledged and given credit. If the material is remixed, transformed or built upon in any way the new creation must be distributed under the same licence terms as the original work. To view a copy of this licence, visit https://creativecommons.org/licenses/by-nc-sa/4.0/

www.healthcareimprovementscotland.scot

You can read and download this document from our website.
We are happy to consider requests for other languages or formats.
Please contact our Equality and Diversity Advisor on 0141 225 6999
or email his.contactpublicinvolvement@nhs.scot

Healthcare Improvement Scotland

Edinburgh Office	Glasgow Office
Gyle Square	Delta House
1 South Gyle Crescent	50 West Nile Street
Edinburgh	Glasgow
EH12 9EB	G1 2NP
0131 623 4300	0141 225 6999