Healthcare Improvement Scotland

Care navigation toolkit

What is care navigation?

Care navigation gives people options to access the care and information which best meets their health and social care needs. This helps them to be seen by the right person, at the right place and at the right time.

Care navigation creates an opportunity for a person-centred conversation. It encourages patients and carers to make an informed choice on how to best manage their own health and wellbeing.

Why is care navigation important?

Implementing care navigation makes best use of appointments and resources within GP practices. Practice Administrative Staff Collaborative (PASC) phase 1 teams identified that developing the skills of practice administrative staff leads to an increase in job satisfaction, morale and confidence.

Care navigation also builds and strengthens relationships between GP practices and other organisations and services out with the GP practice.

'My day job has changed because it's quite satisfying knowing that I have helped somebody to see the right person.'

Sharon Kerr, Patient Advisor, Biggar Health Centre

The benefit for people needing care is that they can be seen by the most appropriate person at the right time.

'Being offered an appointment with the nurse practitioner was really good as they were able to do something there and then so I wouldn't have to book another appointment later which is just a waste of everyone's time.'

A patient at Medwyn Medical Practice

For care navigation to be implemented effectively a whole GP practice approach is essential. This enables trained practice administrative staff to follow locally-developed principles – giving patients access to safe, efficient and effective information.

Our improvement toolkit provides information and guidance on how to plan, test and implement care navigation.

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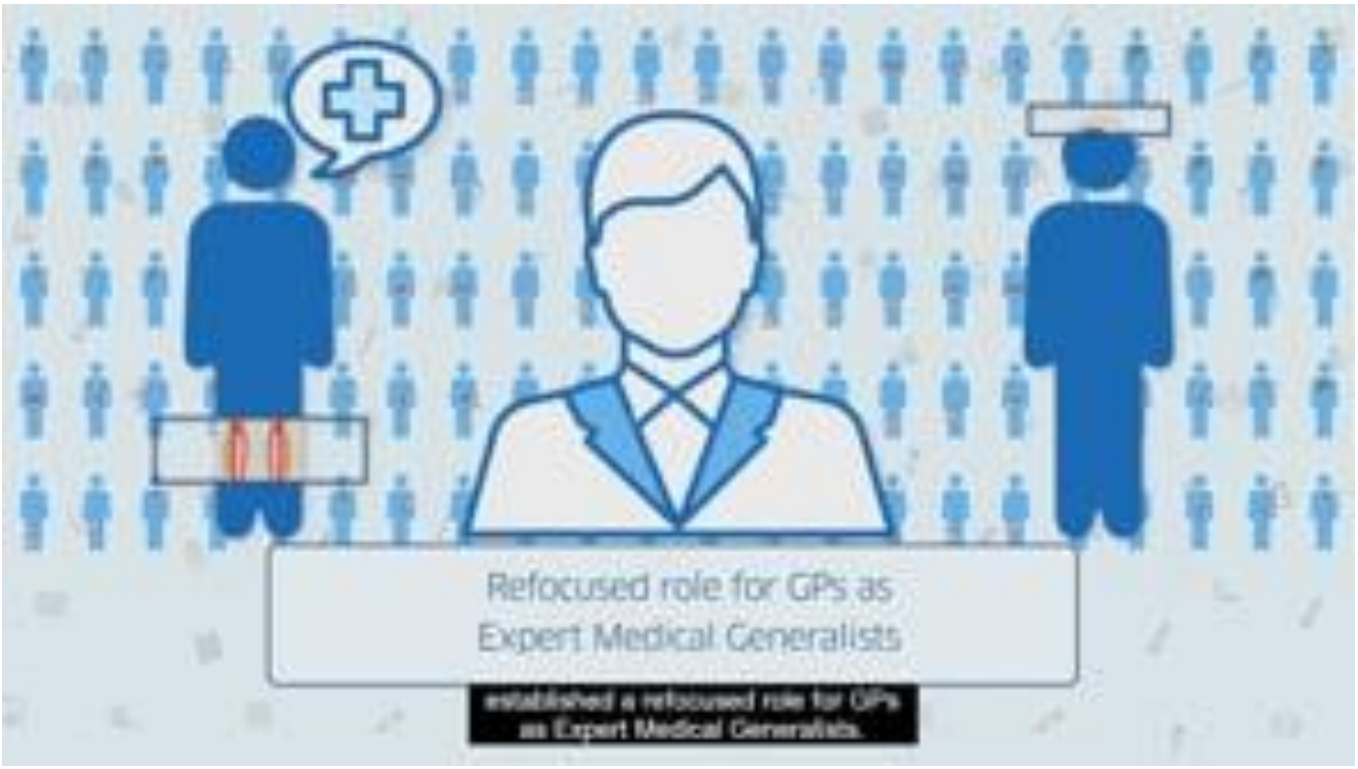
The motion graphic below provides further information on the work of care navigation:



Care navigation toolkit overview

- Are you ready for care navigation?
- Delivering care navigation
- How to measure progress
- Sustaining success

Being prepared

GP practices have varied experience of care navigation. However, whatever previous experience a GP practice has, there are a number of steps to consider before embarking on this work.

Step 1: Find out if your GP practice is ready for care navigation

In order to be prepared for the work that lies ahead, using the care navigation readiness tool will help you to understand:

- current ways of working within your GP practice
- the motivation of your staff to develop, test and implement care navigation, and
- GP practice resources and abilities to develop, test and implement care navigation.

Step 2: Talk to your team about the work

For care navigation to be implemented effectively a whole GP practice approach is essential.

All members of the GP practice team need to be aware that this work is being undertaken. The following should be considered.

- Who will lead the work?
- When are you going to meet and how regularly?
- How are you going to communicate? Don't forget wider team members such as locums.
- How are you going to involve patients and carers?

Step 3: Understand your current GP practice

GP practice teams need to carry out a number of steps to help them understand their current knowledge of care navigation, processes and available resources within the GP practice.

- Identify the level of care navigation currently happening using the care navigation data collection template.
- Find out what your staff currently know and understand about care navigation and the resources available using the care navigation staff questionnaire 1 and/or care navigation staff questionnaire 2.
- Identify current primary care services available – remember to consider future services.
- Use the care navigation patient awareness questionnaire to find out what your patients currently know and understand about care navigation and the services currently available to them.

Every GP practice team member will have some knowledge of how a GP practice's processes work in relation to care navigation. To ensure an accurate picture, it is helpful to map your current care navigation process with your team. This can be done by process mapping.

The benefits of process mapping:

- to capture and visually represent all the steps in an existing process

- to show everyone in a team how a process works in practice now, rather than what they think is happening
- to help identify change ideas for improvement
- to visually represent a new process
- to assist team building as it should involve all team members in accurately capturing current process and the design of any new process, and
- to map out the patient journey so that you can find out how many steps it takes to get the patient to the appropriate person.

The care navigation flow chart is an example of how a PASC phase 1 team has mapped its processes for care navigation.

More information on process mapping and its benefits here.

Step 4: Measure what is currently happening

'To measure is to know – rather than assume – what to improve, where to improve and whether you are successful in your efforts to improve.'

Ross Davies, Data & Measurement Advisor, Healthcare Improvement Scotland

In order to understand your system and how it can be improved, it is important to measure current care navigation activities over a short period of time (baseline data). This may involve a manual count.

Fun and innovative ways of measuring progress can be used such as fishbowl counting. This method involved PASC phase 1 GP practices dropping a pebble in a bowl every time a member of the administrative team had a conversation with a patient about care navigation and/or a patient expected an alternative appointment to a GP.

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.

PASC phase 1 teams developed an EMIS Template and installation instructions on the EMIS patient access portal to assist with data collection.

Increasing patient awareness and knowledge of other primary care services that are available has been found to be helpful. PASC phase 1 teams developed a team questionnaire to find out what patients knew.

Step 5: Identify your resources and what you need

You should consider the following when process mapping your local system to help you identify your existing resources.

- Where are you in the care navigation process?
- Are your patients offered information and informed about other services?

- Do you have any frameworks and guidelines for care navigation that you are using in your GP practice?
- Do you have staff available and trained for care navigation?
- Contact your indemnity provider to discuss proposed work and consider any GP practice implications
- IT systems – do you have any electronic means to record care navigation?
- Does your reception space allow for confidential discussions with patients?

Step 6: Identify and provide staff education

Identifying the staff training needed to progress this work is crucial. Providing training and education for care navigation can result in an increase in job satisfaction, morale and confidence.

Learning from the collaborative suggests that a mixture of in-house and external training is beneficial. This can be achieved by working with other GP practices and inviting local experts or external training providers into the GP practice.

Step 7: Involve patients and carers to ensure effective communication

It is essential your GP practice establishes clear methods of communication with patients and carers about the services your GP practice provides and methods of signposting to other health and care providers.

PASC phase 1 teams worked with patients, carers and local communities to develop a range of resources to support communication.

The following resources have been created by our PASC teams:

- Patient Information Leaflet 1
- Patient Information Leaflet 2
- Patient Information Leaflet 3

Digital Signposting and self-care advice

Care navigation can also help people to care for themselves and their families.

NHS 24 can provide a range digital resources and services that supports self-care advice and information (including but not limited to) NHS inform, Scotland's Service Directory, Self Help Guide, Care Information Scotland, Quit Your Way Scotland, Immunisation Scotland, Screening Scotland, Ready Steady Baby.
All of which can underpin the care navigation and Signposting role for practice staff. This would result in consistency of approach, quality standards and effective communication and networking across the primary care community.

NHS inform

NHS inform is Scotland's national health information service. It provides accurate information to help people make informed decisions about their own health and the health of the people they care for. The website has enhanced features and interactive digital tools to allow people to tailor the information, making it more personal to them.

- **Self help guide:** fully revised, updated and aligned to the 111 service the new Self Help Guide allows you to check your symptoms online and get advice to manage your condition or signpost to the right service.
- **Scotland's service directory** provides easy access to a range of health and wellbeing services.
- **Info for me** is a personalisation tool, which enables people to bring together information relevant to them into a single place, which can be easily printed saved or shared.

The toolkit provides digital assets that can be used in a range of different ways including:
- wording to support messaging in newsletters etc
- information screens in your practice, and
- practice website and social media channels.

It can be found here.



We'll keep you right

'We'll keep you right' is a campaign made up of a variety of digital assets delivered by NHS 24, (on behalf of NHS Scotland).

The 'we'll keep you right' campaign provides simple information on the range of services that are available to help people across Scotland to access the right treatment, by the right service, at the right time.
This campaign includes a range of digital assets which have been produced in a range of sizes for you to display on your website and waiting room screens along with a link to www.nhsinform.scot. Please let us know your size preferences by emailing hqcommunications@nhs24.scot.nhs.uk



There are also a range of NHS inform and 'We'll keep you right' resources such as leaflets and posters available for download or hard copy versions can be requested from leaflets@nhs24.scot.nhs.uk

Step 8: Check you are ready

The following checklist can help you find out if you are ready to progress with delivering care navigation. If you are ready you will have:
- an understanding of what care navigation is
- established your team and how to communicate about the work
- gathered baseline information
- an understanding of your current practice

- an understanding of your current resources
- established what resources community colleagues have
- established staff and patients' understanding of care navigation, and
- made sure staff have the skills and confidence to undertake care navigation.

Delivering care navigation

Care navigation varies from GP practice to GP practice and one size will not fit all. However, to deliver care navigation and develop a safe, efficient and effective process, a number of steps need to be taken.

Step 1: Develop your team's aims for care navigation

It is crucial that your team develops aims for care navigation and decides what is to be achieved and when.

This will help your team use the knowledge of your local system gained from process mapping to develop local aims within your GP practice and help monitor progress.

An aim helps keep you focused on what you are trying to achieve. For more information and guidance on developing aims click here.

Once you have agreed your aims you will be ready to develop your ideas and how they can be tested.

Step 2: How to achieve your aims

A driver diagram is a tool which visually presents a team's theory of how a goal will be achieved. Creating a driver diagram with your team states your aim and what steps you need to achieve it. It also helps the whole team contribute ideas that will bring about change.

For more information and guidance on driver diagrams click here.

PASC phase 1 teams developed driver diagrams for their local work. They can help you think about which change ideas to test. Change ideas are the things you can specifically test to see if they make a difference.

More information on 'What is a change idea?' can be found here.

An example of a care navigation driver diagram was developed by the PASC phase 1 teams.

Step 3: Test your ideas

Now it's time to test your ideas to develop your care navigation framework. The framework will provide a set of principles, tools and guidance for care navigation in your GP practice. Rapid small tests of change are the best way to identify what is working in order to refine and retest – Plan Do Study Act (PDSA) is a helpful tool to facilitate this process.

Here are some examples of PDSA cycles undertaken by PASC phase 1 teams.

- PDSA example 1
- PDSA example 2
- PDSA example 3
- Blank PDSA cycles

For more information and guidance on PDSA cycles click here.

Step 4: Develop your care navigation framework

Now that you have had an opportunity to test ideas and bring them together you should have a care navigation framework to test for your GP practice.

Here are some examples created by PASC phase 1 teams.

- Care navigation guidelines
- Protocol on who to see
- Care navigation algorithm example

Step 5: Test your care navigation framework

When testing, make sure you:

- collect data on the agreed work for care navigation (measures) in your GP practice – you can use the care navigation measurement tool
- build in safety checks (is the framework doing what it is supposed to do?), and
- ask your staff how they are feeling about the changes – you may wish to revisit the staff questionnaire you used to understand your current practice to find out how your staff are feeling about care navigation.

How to measure progress

Now that you are testing your framework, it is important to build on the baseline data you collected before you implemented the changes. This will tell you if changes you have made have resulted in an improvement. PASC phase 1 teams developed measures for their local work, which may help you when considering what to measure. These measures can be found in the downloadable resource care navigation driver diagram and measurement plan.

Ways to measure

There are two different ways to measure your progress in your GP practice:

1. **Manual measurement** – this can be carried out using templates to gather data or other innovative methods such as dropping a pebble in a bowl every time a member of the administrative team has a conversation with a patient about care navigation.
2. **Using existing IT document management systems** – the EMIS template that was created initially to help with the data recording has been developed further. It now includes criteria on referral information and opening and closing times of other services.



Collect regular and consistent data

Whatever way you measure your progress, it is important to collect regular and consistent data over time and continue to sample the data for potential adverse events.

Share and discuss your data

Finally, the most important thing is to share and discuss your data with your whole GP practice team, so everyone is involved and knows what is working.

PASC phase 1 teams have used the digging deeper resource to review and discuss their progress.

Sustaining success

Achieving success is great but it is important to plan for sustaining that success.

In order to sustain care navigation in your GP practice it is important you identify team members who are responsible for reviewing, testing and updating the framework, service provider information and resources that will help you. Care navigation is an ongoing process that requires keeping in contact with colleagues: both internal to the GP practice and external community colleagues.

Hear more from our PASC phase 1 team on the success of care navigation in their GP practice.



Our PASC phase 1 teams have provided a number of top tips to help you sustain success.

Top tips

1. Consider and plan for the ongoing educational needs of existing and new GP practice staff.
2. Identify staff responsibilities for keeping the framework, service provider information, resources and tools up to date.
3. Sample data to check that the improvement is sustained and continue to check for any adverse events – don't stop collecting data once your patients are attending appointments with other services.
4. Continue to measure staff satisfaction on the new ways of working.
5. Celebrate success and the difference it has made to individuals, teams and patients.

Further tips have been provided by the Institute for Healthcare Improvement (IHI).

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