Case Scenario #3- PN Administrator

This case scenario was developed to help learn how to use the Administrator functions within NACI Care©

> **Tip #1:** The goal of this scenario is to allow you to see the breadth and depth of NACI Care© as well as to become familiar with the functionality of the program. You have been provided with multiple options to look at every component of the Administrator's functions, but do not need to complete them all.

> **Tip #2:** The PN Administrator determines which topics are available for the PN to enter information. There are more than 5,000 fields and no navigation program would use everything. After some use and when desirable, the Administrator can change the topics that are available for the PNs. If the Administrator chooses to delete topics that already included data, the data are not lost.

SCENARIO

1. You are the PN Administrator for Mountain Health Clinic, and you just received a small grant that allows you to expand the patient navigation services to Canada. The focus of the grant is on physical activity and quality of life in cancer survivors.

2. System Preferences. Because the program is based in Canada, the measurement system needs to be Metric rather than American.

3. User Approval. You hire three part-time PNs and need to set up NACI Care© so they can load grant-specific information. Enter their first and last names, give them a bogus email or ID (please add "Test" at the beginning of the bogus ID)*, create a password for each and enter their start date.
    a. TestJessie TestRogers is a Nurse Navigator and works in the clinic for another program, but will begin to work on the new grant. She started part-time on the grant on March 25, 2019.
    b. TestKerry TestArman is a community-based (lay, unlicensed) PN who works in the community. She started work on April 4, 2019
    c. TestJackie TestSmith is a community-based PN who is close to completing his Social Work bachelor's degree. He started work on April 26, 2019

    *Note: Adding Test prior to name and ID will allow you to omit these test data from future reports or other data uses.

4. Checklist for PN access (Use this to identify the topics for data entry. In general, you only want your PNs to enter information that needs to be reported to the funder and not waste time on unnecessary information).
    a. **NOTE[1]: Any topics that are not selected will not appear on the PN's screens.**
    b. NOTE[2:] Specific reports will not be available on topics not selected.

    c. Demographics,
        For this grant, you will not need sexual orientation, language, religion or information about with whom the patient is living or whether they have dependent children or elders.

d. General Health Behaviors
This is a SMALL grant, limited to physical activity and survivorship (quality of life):
1) Select Physical Activity
2) Select Rate patient's general health
3) Select Rate patient's quality of life

e. Current Health Issues
1) The grant is focused on cancer. Select Health Issues: Medical (includes cancer and other conditions)
2) Select Cancer
3) Select every toggle, or select Other and type in "all sites"

f. Health History

The grant needs to identify which cancer survivors had serious previous health issues, such as cancer, cardiovascular disease or diabetes. The grant also needs to identify familial and/or genetic cancer risk, particularly for survivors who have first degree relatives (parent, siblings, children) who have or had cancer of any kind.

1) Select Health Issues
2) Select Health Issues: Medical
3) Select Family Cancer History

g. Barriers and Solution

These are defaults included for all users. The grant will need to document barriers that affect the survivors' quality of life and how those barriers were resolved (solutions).

h. Referrals and Appointments.

These are defaults included for all users.

i. Education
1) Education topics are defaults included for all users.
2) There is low need for Education assessments for this small grant (shows the patient's needs and interests, level of readiness and literacy level) even though this is important information to collect. With limited funds, you are not going to have the PNs collect this.

j. Surveys

For this grant, the PNs will collect six short surveys:

1) Select Surveys & Data Collection; Select
   a) Overall health
   b) Quality of life
   c) Symptom Distress Scale
   d) Patient Goals
   e) Survivorship care plans (will need to scroll topic to select)
   f) PN Satisfaction

5. From Adm Sub-Sidebar, Select Default Report Templates

     a. Select referrals; Select
        1) Clinical Trial Referrals
        2) Social Support Referrals
        3) Palliative Care Referral
        4) Social Support Referrals for survivors who have completed SCP

     b. Select Surveys; Select:
        1) Patient Experience / Patient Satisfaction with Care
        2) Patient Satisfaction with Patient Navigation Program
        3) Psychosocial Distress Screening
        4) Patient Goals
        5) Survivorship Care Plan

6. Additional Administrative Filters & (tailored) Reports
     a. Add the date filter
     b. Clear filters
     c. Select Filter by Date
     d. The start date is January 1, 2019
     e. The end date is June 30, 2021
     f. The total referred dropped slightly