

# Responding to the Patient Navigation Imperative in the Full Application

## Introduction

Forming Ontario Health Teams (OHTs) have been explicitly tasked with defining their approaches to system navigation.

### **3.3.2. How will you help patients navigate the health care system?**

Patients should never feel lost in the health care system. They should be able to easily understand their options for accessing care and know where to go for the services they need. Considering the needs of your Year 1 population, please propose how your team will provide system navigation services for your Year 1 population. Describe what activities are in and out of scope for your system navigation service in Year 1. Describe which patients will have access to system navigation and how they will access the service. Indicate whether system navigation will be personalized (e.g., will the system navigator have access to a patient's health information)

Your response will need to address three components:

1. Who will be able to access your system navigation solution?
2. How will they do so?
3. Will your system navigator be able to access patient health information?

To respond effectively to this question, you will need to understand not only the assumptions implicit in it but also government expectations.

## *Assumptions*

- You will need actual staff to perform system navigation
- These personnel will rely on a service or tool
- This tool is digital, with the potential to integrate into, or be inter-operable with, an electronic health record

## *Expectations*

- Patients and caregivers must be able to access system navigation 24/7
- System navigation must drive integration and smooth the patient journey
- A solution should help make the health system easy to access and responsive to patient information needs

## Planning a System Navigation Solution – 11 Questions

What does this mean for planners who must devise a solution? You will need to define roles and scope out the sort of tool needed to support those roles. These 11 questions will help shape your thinking:

1. What level of service will you provide to priority populations in year 1?
2. How will that level of service change in subsequent years?
3. Will you support non-priority populations with system navigation needs? If so, how?
4. How will you define the system navigator role?
5. How will your system navigators interact with patients and caregivers?
6. Will you draw on existing personnel to perform system navigation or recruit for the role?
7. What information will you provide directly to patients and to system navigators?
8. How will you obtain this information, validate it and keep it current?
9. How will you present this information digitally?
10. Who will be able to access the information and how?
11. Will your information presentation tool work alongside your EHR or be integrated within it?

## Considerations

These questions should help you frame your response to this part of your application. In thinking through the response, we recommend you have discussions about the following aspects of effective system navigation:

### *Integration*

Deployment speed will be affected by the choice to integrate a system navigation tool within an EHR or use a tool alongside (but separate from) it. While the former offers the benefits of capturing system navigation encounter information within a patient's record, the latter allows for easier deployment, more open access to information and the elimination of PHIPA considerations.

### *Information management*

You will need a defined work flow for acquiring information about health services from one or more sources, validating it, maintaining its currency and distributing it to those who need it. This involves data collection both for broadly available health services and for those that target your priority populations (which may involve more detailed data collection). This will need to be supported by a data collection method, inclusion criteria and explicit data stewardship responsibilities.

### *System navigator role*

In our assessment, there are seven functions of an effective system navigator:

1. Understands how the health care system works
2. Knows where to find information about services, including availability and eligibility
3. Connects patients and caregivers to services and service providers to other providers
4. Gathers and shares information about local health services
5. Trains others to navigate the system effectively
6. Advocates on behalf of patients for access to services
7. Builds awareness of available services and promotes them locally

### *Data presentation*

Consideration should be given to how to present the health services information to make it both useful and usable to patients, caregivers and system navigators. There are several options for presenting health service information in support of system navigation, depending on the preferred integration option and the decision you've made about who you're providing access to:

1. Embedded within an EHR
2. Patient portal, including a searchable service directory, enriched by relevant patient self-care information resources
3. Provider portal, including a searchable service directory, empowered by provider education and support content
4. An application programming interface (API) providing a searchable service directory, embedded in an existing or planned website

### **How Thehealthline.ca Information Network can help**

As a non-profit established with a mandate to support patients, caregivers, health care providers and system planners with information about services available across the province, we are well-positioned to help OHTs build effective system navigation tools. Partly funded by the Ministry of Health, we manage the provincial service directory database, provide information management to support it, collect information about services and present it in many different ways (including through 14 regional websites, special purpose sites). We also supply the data that powers the Ontario government's Health Care Options tool.

Looking specifically at OHT system navigation needs, we can:

- Provide system navigation advisory and planning services
- Collect data relevant to priority populations
- Build patient and provider portals
- Create APIs to embed health services information into EMRs, EHRs, secure patient and provider portals as well as existing websites