

Appendix Navigator Log



This is an example from ARC program. Please adapt it for your setting

Navigator Log

ONE TIME FORMS:

These forms capture data that occur once per patient

Patient:

General

- Demographic information
- Contact information and preference for mode of communication
- Date of referral
- Referring practitioner
- General information contained in the referral form

Barriers and Expectations (In general)

Usually elicited at first encounter

- List of expectations and preferences the individual expresses for resources (see Guide 2 appendices: Summary and Planning Forms – Section 3)
- List of barriers patients anticipates encountering to accessing the resource (see Guide 2 appendices: Summary and Planning Forms – Section 4)

Process verification

Add check boxes to capture that required activities were done. This could include:

- Used active offer
- Trained on using 211
- Reason for discharge (achieved access, patient wishes to discontinue services,...)

Action Plan

- Developed a plan together to with the patient detailing what the navigator and individual are each responsible for (see Guide 2 appendices: Summary and Planning Forms-Section 6,7 and Shared Action Plan)

REPEATED FORMS:

These capture data for which there are multiple records per patient

Needs and Actions

Complete one record for each need identified in the referral and additional ones the individual raises during the navigation support. (see Guide 2 appendices: Summary and Planning Forms – Section 1,2). These records are completed over time. Some information will be captured during the planning meeting, and others may follow after.

- Need

- Priority level
- Readiness level
- Anticipated barriers
- Expectations
- Activities (include all activities to remove barriers such as completing required forms, scheduling their first visit with the resource,
- Resource referred to (include info about its appropriateness for the patient)
- Accessed resources yes/no (assessed before discharging patient from navigation)
- Reason for not accessing
- Other general comment box

Reporting

- Form created to be printed and shared with the referring provider at baseline, at end of study, at any other time as needed
- For form content (see Guide 2 appendices: Navigator Feedback Form)

Encounters

- Date
- Time
- Activities/discussion items