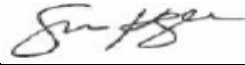



**North Carolina Breast & Cervical Cancer Control Program (NC BCCCP)  
NC WISEWOMAN Project**

<b>NC BCCCP &amp; WISEWOMAN Patient Navigation Policy</b>	<b>Category/Number: N/A</b>
<b>Approved By:</b>  _____ <b>NC BCCCP Medical Advisor</b>   _____ <b>NC BCCCP Program Director</b>	<b>Section: NC BCCCP Training Manual - Overview</b>  <b>Program: NC BCCCP/WISEWOMAN</b>
<b>Effective Date:</b> 05/04/15  <b>Current Revision Effective Date:</b> 04/01/21 <b>Revision History Date/s:</b>	<b>Review Date/s:</b> 5/30/17; 3/29/18; 03/11/2019  _____  _____

**Purpose:**

- To ensure that women enrolled in the NC BCCCP or WISEWOMAN receive timely and appropriate diagnostic and treatment services.
- To identify non-medical patient barriers, such as transportation, scheduling, and lack of understanding about the need for or nature of follow-up procedures.
- To overcome these barriers so that the patient can keep follow-up appointments and take action on recommendations.

**Policy:**

It is the policy of the NC BCCCP and WISEWOMAN Project to follow the recommendations of the CDC’s NBCCEDP and WISEWOMAN programs, including recommendations based on the Screening and Diagnostic Services Chapter of the *NBCCEDP Program Guidance Manual* and the *WISEWOMAN Technical Assistance and Guidance Document*.

All NC BCCCP or WISEWOMAN-enrolled women with an abnormal screening result must be *assessed* for their need of patient navigation services and provided with such services accordingly. Screening results which require a patient navigation assessment are:

- Clinical Breast Exam results of discrete palpable mass, serous or bloody nipple

discharge, nipple or areolar scaliness, or skin dimpling or retraction

- Mammogram results of BIRADS 3, 4, or 5
- Pap test results of ASC-US if HPV is positive, LSIL, or high-grade lesions
- WISEWOMAN alert values of systolic BP  $\geq 180$  mmHg, diastolic BP  $\geq 120$  mmHg, or fasting blood glucose values of  $\leq 50$  or  $\geq 250$  mg/dL

Patient navigation services conclude when a client initiates treatment, refuses treatment, or is no longer eligible for NC BCCCP or WISEWOMAN services. When a woman concludes her cancer treatment or is receiving medical care for her WISEWOMAN alert values, has been released by her treating physician to return to a schedule of routine screening, and continues to meet NC BCCCP and/or WISEWOMAN eligibility requirements, she may return to the program and receive all its services.

Patient navigation is defined as assisting NC BCCCP or WISEWOMAN eligible women to identify and overcome barriers to screening, diagnosis, and/or treatment.

**Responsibilities:** Local BCCCP Providers

**Procedure:**

The NC BCCCP & WISEWOMAN patient navigation policy outlines the key elements of patient navigation. These are assessing, planning, coordinating, monitoring, developing resources, and evaluating. The elements represent a cooperative process between the BCCCP or WISEWOMAN provider, the patient, and medical providers to ensure timely and appropriate diagnostic and treatment services.

**Assessing-**This element involves a cooperative effort between the BCCCP or WISEWOMAN provider and patient to determine the patient's need for essential support to complete the recommended screening or follow-up. To comply with patient privacy protection policy, BCCCP and WISEWOMAN providers must document consent to services and ensure confidentiality. Providers should use the top half of the DHHS Form 4091 or another approved method to document Patient Navigation Needs Assessment.

**Planning-**This element includes the development of a written plan for an individual patient. The plan should meet the immediate, short-term, and long-term needs identified in the assessment. BCCCP and WISEWOMAN providers should collaborate with the patient to set goals and related activities with timeframes and delineate who is responsible for meeting the goals. Providers should use the bottom half of the DHHS Form 4091 or another approved method to document the Patient Navigation Care Plan when a need has been identified by the assessment. Patient navigation needs assessment and/or care plan will be documented in the patient's medical record to assure continuity of care.

**Coordinating-**This element is the brokering of referral to needed services. BCCCP and WISEWOMAN providers should document the steps taken in the patient plan. Maintaining close communication between BCCCP and WISEWOMAN providers, the

patient, and the patient’s medical providers will ensure that services—both medical and supportive—are coordinated for optimal outcomes.

**Monitoring**-This element involves the ongoing reassessment of the patient’s needs through regular communication. BCCCP and WISEWOMAN providers should update patient plans on the basis of routine re-assessments. Documentation of who, what, and when in the patient’s written plan for patient navigation will determine when it might be necessary to update the plan. Plans should be simple and relate to assisting the woman to keep her screening or follow-up appointments. In most cases, BCCCP and WISEWOMAN providers should use notation stating that the patient kept her appointment and that she understood what her next action should be and when.

**Developing Resources**-This element includes the establishment of formal and informal agreements to maximize the availability of and access to essential screening support services and diagnostic and treatment resources. It also includes the promotion of self-sufficiency and self-determination among patients by ensuring that women gain the knowledge, skills, and support needed to obtain necessary services. Patient education regarding the purpose and expected outcomes of diagnostic testing should be promoted and tailored for each individual woman. The ultimate goal of the program is not just to ensure that the woman receives the needed services, but also that she gains knowledge and skills for follow-up that are independent of patient navigation support (e.g., self-efficacy).

**Evaluating**-This element involves assessing patient satisfaction, access, and timeliness of referral services, as well as the quality of individual patient navigation plans. BCCCP and WISEWOMAN providers should ask and answer questions such as “Were barriers to diagnosis and treatment overcome in a timely fashion?”

**References:** *NBCCEDP Program Guidance Manual* and the *WISEWOMAN Technical Assistance and Guidance Document*.