

Academy of Oncology Nurse & Patient Navigators®

Announces Standardized Navigation Metrics

Project Team Leaders: Tricia Strusowski, MS, RN, Manager at Oncology Solutions; Elaine Sein, RN, BSN, OCN, CBCN, Consultant; Danelle Johnston, RN, MSN, OCN, CBCN, Director of Navigation at Sarah Cannon

Project Team: Sharon Gentry, RN, MSN, AOCN, CBCN, Breast Nurse Navigator at Novant Health Derrick L. Davis Cancer Center, Elizabeth Brown, MSN, MHA, RN, NE-BC, OCN, Senior Director of Navigation at Sarah Cannon; Nicole Messier, RN, BSN, OCN,
Nurse Navigator at The University of Vermont Medical Center; Barbara McHale, RN, BS, OCN, CBCN, Nurse Navigator at St. Mary's Cancer Treatment Center and Samaritan Radiation Oncology, SPHP; Cheryl Bellomo, RN, MSN, OCN,
Nurse Navigator at Intermountain Southwest Cancer Center; Linda Bily, MA, CSA, Director of Patient Advocacy at Stony Brook University Hospital; Vanessa Rodriguez, MSW, Breast Patient Navigator at Memorial Hospital West

BACKGROUND

There is a gap in the literature regarding the key areas that measure the success of navigation programs: patient experience (PE), clinical outcomes (CO), and business performance or return on investment (ROI) metrics that will demonstrate the sustainability of navigation programs. In the report published by the Institute of Medicine (IOM), "Ensuring Quality Cancer Care," the IOM's recommendation is that quality care is measured using a core set of metrics. "To ensure the rapid translation of research into practice, a mechanism is needed to quickly identify the results of research with quality of care implications and ensure that it is applied in monitoring quality."



To develop standard metrics in the area of PE, CO, and ROI using the AONN+ DOMAINS for certification (Professional Roles and Responsibilities, Patient Advocacy, Psychosocial Support Assessment, Care Coordination, Community Outreach, Operations Management, Survivorship/End of Life, and Research & Quality Performance Improvement). These domains contain a comprehensive list of all areas navigators practice to provide quality patient care and financial stability for their organizations.

METHODS

The project team leaders developed a project proposal that was submitted to AONN+ executive leadership for approval and support to fund this initiative. AONN+ leadership accepted the proposal and organized a project team of content experts. AONN+ formed this team to create standard metrics in the three identified areas focused on PE, CO, and ROI using the AONN+ domains. The project team leaders held a WebEx to roll out the project, timelines, and expectations of each team member and outlined the preparation required prior to retreat. Each member completed a literature review on the assigned domain for which they had validated expertise. Each member used measure development criteria ensuing feasibility, meaningfulness, and breadth of metric to ensure reliability and validity. AONN+ held a one-day retreat with the task force members to review metrics for each domain, literature support, and benchmarks, and finalized a set of standard metrics. Using a Likert scale, the team ranked metrics to determine which met rigorous review and were acknowledged as high validity that all navigation programs can utilize.

Care Coordination/Care Transition

Metric	Definition	Patient Experience (PE), Clinical Outcomes (CO), Return on Investment (ROI)
Treatment Compliance	Percentage of navigated patients who adhere to institutional treatment pathways per quarter	ROI, CO
Barriers to Care	Number and list of specific barriers to care identified by navigator per month Barriers to care definition: Obstacles that prevent a cancer patient from accessing care, services, resources, and/or support	PE, CO
Interventions	Number of specific referrals/interventions offered to navigated patients per month Intervention definition: The act of intervening, interfering, or interceding with the intent of modifying the outcome	PE, CO
Clinical Trial Education	Number of patients educated on clinical trials by navigator per month	PE, CO
Clinical Trial Referrals	Number of navigated patients per month referred to clinical trial department	PE, CO
Patient Education	Number of patient education encounters by navigator per month	PE, CO, ROI
Diagnosis to Initial Treatment	Number of business days from diagnosis (date pathology resulted) to initial treatment modality (date of 1st treatment)	PE, CO
Diagnosis to 1st Oncology Consult	Number of business days from diagnosis (date pathology resulted) to initial oncology consult (date of 1st appointment)	PE, CO

Survivorship and End of Life

Metric	Definition	Patient Experience (PE), Clinical Outcomes (CO), Return on Investment (ROI)
Survivorship Care Plan	Number of navigated patients (patients with curative intent) per month who received a survivorship care plan and treatment summary	PE, CO
Transition from Treatment to Survivorship	Percentage of navigated analytic cases per month transitioned from completed cancer treatment to survivorship Define care transitions: "the movement patients make between healthcare practitioners and settings as their condition and care needs change during the course of chronic or acute illness"	PE, CO
Referrals to Support Services at the Survivorship Visit	Number of navigated patients per month referred to appropriate support service at the survivorship visit	PE, CO, ROI
Palliative Care Referral	Number of navigated patients per month referred for palliative care services	PE, CO, ROI

Operations Management, Organizational Development, Health Economics

Metric	Definition	Clinical Outcomes (CO), Return on Investment (ROI)
30-, 60-, 90-Day Readmission Rate	Number of navigated patients readmitted to the hospital at 30, 60, 90 days. Report quarterly	ROI
Navigation Operational Budget	Monthly operating expenses by line item Definition: Operational budget is a combination of known expenses, expected future costs, and forecasted income over the course of a year	ROI
Navigation Caseload	 Number of new cases, open cases, and closed cases navigated per month Definitions: New cases: New patient case referred to the navigation program per month Open cases: Patient case that remains open per month Closed cases: Number of patient cases closed per month. Formal closing of a patient case from the navigation program 	ROI
Referrals to Revenue- Generating Services	Number of referrals to revenue-generating services per month by navigator	ROI
No-Show Rate	Number of navigated patients who do not complete a scheduled appointment per month	ROI
Patient Retention through Navigation	Number of analytic cases per month or quarter that remained in your institution due to navigation	ROI
Emergency Department Utilization	Number of navigated patient visits to the emergency department per month	ROI
Emergency Admissions per Number of Chemotherapy Patients	Number of navigated patient visits per 1,000 chemotherapy patients who had an emergency department visit per month	ROI

Professional Roles and Responsibilities

Metric	Definition	Patient Experience (PE), Clinical Outcomes (CO), Return on Investment (ROI)
Navigation Knowledge at Time of Orientation	Percentage of new hires who have completed institutionally developed navigator core competencies	CO
Oncology Navigator Annual Core Competencies Review	Percentage of staff who have completed institutionally developed navigator core competencies annually to validate core knowledge of oncology navigation	CO

Community Outreach, Prevention

Metric	Definition	Patient Experience (PE), Clinical Outcomes (CO), Return on Investment (ROI)
Cancer Screening Follow-Up to Diagnostic Workup	Number of navigated patients per quarter with abnormal screening referred for follow-up diagnostic workup Cancer screening definition: Screening tests can help find cancer at an early stage, before symptoms will appear. When abnormal tissue or cancer is found early, it may be easier to treat or cure. By the time symptoms appear, the cancer may have grown and spread. This can make cancer harder to treat or cure	PE, CO, ROI
Cancer Screening	Number of participants at cancer screening event and/or percentage increase of cancer screening	PE, CO
Completion of Diagnostic Workup	Number of navigated individuals with abnormal screening who completed diagnostic workup per month per quarter	CO, ROI
Disparate Population at Screening Event	Number of individuals per quarter at community screening events by OMB Standards Disparate population definition: The National Institute on Minority Health and Health Disparities definition are differences in the incidence, prevalence, mortality, and burden of disease and other adverse health conditions that exist among specific populations in the United States (racial and ethnic minorities, low socioeconomic status) OMB definition: Office of Management and Budget	PE, CO

Research, Quality, Performance Improvement

Metric	Definition	Patient Experience (PE), Clinical Outcomes (CO), Return on Investment (ROI)
Patient Experience/ Patient Satisfaction with Care	Patient experience or patient satisfaction survey results per month (utilize institutional-specific navigation tool with internal benchmark)	PE
Navigation Program Validation Based on Community Needs Assessment	Monitor one major goal of current navigation program annually as defined by cancer committee Example: Population Served	PE, CO, ROI
Patient Transitions from Point of Entry	Percentage of navigated analytic cases per month transitioned from institutional point of entry to initial treatment modality Care transitions definition: "The movement patients make between healthcare practitioners and settings as their condition and care needs change during the course of chronic or acute illness" (Coleman, n.d., para 1) Define modality: chemotherapy, surgery, radiation therapy, endocrine therapy, and biotherapy	PE, CO
Diagnostic Workup to Diagnosis	Number of business days from date of abnormal finding to pathology report for navigated patients Definition of abnormal finding: Number of business days from abnormal finding diagnostic workup (date of workup) to diagnosis (date pathology resulted)	CO

Psychosocial Support, Assessment

Metric	Definition	Patient Experience (PE), Clinical Outcomes (CO), Return on Investment (ROI)
Psychosocial Distress Screening	Number of navigated patients per month who received psychosocial distress screening at a pivotal medical visit with a validated tool	PE, CO
	Pivotal medical visit definition: Period of high distress for the patient when psychosocial assessment should be completed	
	Define various validated tools as example: FACT, NCCN Psychosocial Distress Screening Thermometer	
Social Support Referrals	Number of navigated patients referred to support network per month	PE, CO, ROI

Patient Empowerment, Patient Advocacy

Metric	Definition	Patient Experience (PE), Return on Investment (ROI)
Patient Goals	Percentage of analytic cases per month that patient goals identified and discussed with the navigator	PE, CO, ROI
Caregiver Support	Number of caregiver needs/preferences discussed with navigator per month	CO
Identify Learning Style Preference	Number of navigated patients per month who preferred learning style was discussed during the intake process	PE, CO
	Learning styles:Visual (spatial): You prefer using pictures, images, and spatial understanding	
	 Aural (auditory-musical): You prefer using sound and music 	
	 Verbal (linguistic): You prefer using words, both in speech and writing 	
	 Physical (kinesthetic): You prefer using your body, hands, and sense of touch 	
	 Logical (mathematical): You prefer using logic, reasoning, and systems 	
	 Social (interpersonal): You prefer to learn in groups or with other people 	
	 Solitary (intrapersonal): You prefer to work alone and use self-study 	

RESULTS

The task force developed standardized metrics that focused on the AONN+ certification domains for navigation which concentrated on ROI, PE, and CO. Upon completion of an extensive literature review and after putting each metric through rigorous criteria to ensure accuracy and soundness of each metric, the task force developed 35 metrics.

These are baseline metrics all institutions can use regardless of the structure of their navigation program.

CONCLUSION

The 35 metrics developed are baseline metrics that all navigation programs—no matter what their structure—should be evaluating and monitoring. The task force recognizes that navigation programs are developing at different rates within diverse structural organizations and settings that will determine which standardized metrics will be essential to measure outcomes for their specific navigation program. As disease-specific certification evolves, additional evidence-based disease-specific metrics will need to be developed to dovetail into the standardized navigation metrics.



Standardized Metrics Task Force Team

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