**Survey Key (Survey of Navigator Time on TRIP Activities)**

|  |  |
| --- | --- |
| *This is a list of example tasks for each navigation activity listed on the Survey of Navigator Time on TRIP activities.*  *Feel free to use this survey key as a tool to aid in filling in the survey. Please fill in time spent on each activity in the survey.* | |
| **Navigation Activity** | **Description/Examples** |
| **ADMINISTRATIVE TASKS** | *Administrative tasks involved in TRIP navigation protocol such as identifying patients from reports, documenting navigation activities, or monitoring navigation caseload.* |
| **1. Identifying eligible patients** | * Reviewing pathology reports * Reviewing upcoming appointments * Reviewing patient information in EHR to check eligibility criteria |
| **2. Documenting navigation activities into data systems** | * Entering information in REDCap Registry forms (e.g. Intake, Encounter, Repeat Social Needs Screening, PN Transition/Completion forms) * Entering information in Excel trackers * Entering information in electronic health systems (e.g. Epic, etc.) * Entering information in Quickbase (e.g. social needs screening results, referrals made, etc.) * Entering information in Aunt Bertha (e.g. social needs screening results, referrals made, goals, etc.) * Entering information in THRIVE (e.g. social needs screening results, etc.) * Trouble-shooting data systems (e.g. REDCap Registry, Excel, electronic health systems, Quickbase, Aunt Bertha, THRIVE) alone or with TRIP study team |
| **2a. Documenting in REDCap** | * Of the time you listed in **#2 (Documenting activities into data systems)**, how much of that time do you spend entering information in REDCap or troubleshooting REDCap? |
| **2b. Documenting in Aunt Bertha** | * Of the time you listed in **#2 (Documenting activities into data systems)**, how much of that time do you spend entering information in Aunt Bertha or troubleshooting REDCap? |
| **3. Viewing reports to monitor caseload** | * Viewing population-level reports in REDCap (e.g. Initial Patient Search, Patient Tracking Report) * Viewing population-level reports or trackers in Excel * Viewing other caseload management reports or trackers to monitor TRIP patient caseload and navigation activities |
| **DIRECT PATIENT CONTACT** | *Time spent directly interacting with patients as part of navigating patients using the TRIP protocol. Most likely involves interacting with patient in-person or over the phone.* |
| **4. Intake** | * Speaking with patient in-person or by phone to get information for TRIP intake form * Waiting to talk to patient for intake |
| **5. Social needs assessments** | * Speaking with patient in-person or by phone to administer standardized social needs assessment questions * Waiting to talk to patient to administer social needs assessment |
| **6. Making referrals to address social needs** | * Looking through list of resources with patient * Giving patient list of referrals to social resources to address identified social needs * Helping patients apply for social resources together (e.g. calling a resource together, filling out an application together) |
| **7. Following up on social needs referrals** | * Following up with patient by phone call or in-person regarding incomplete/pending referrals for identified needs * Asking patients on follow-up in-person visits or phone calls if past referrals were accessible and if identified needs were met |
| **8. (Re)scheduling clinical appointments** | * Coordinating/scheduling patient appointments with patient and providers * Rescheduling appointments for patients who missed an appointment |
| **9. Patient education and support** | * Patient education around cancer care and social resources * Emotional support around navigating cancer diagnosis/treatment or identified social needs |
| **navigating on behalf of patient without direct patient contact** | *Time spent conducting activities on behalf of a patient with the goal of coordinating their navigation and care. Does not involve directly interacting with patient by phone or in-person.* |
| **10. Communication with care team** | * Communicating with healthcare team in-person, by phone, or via electronic communication (e.g. EHR) to discuss patient social needs, navigation services, and navigator concerns. Healthcare team includes any member of the care team in your hospital who directly participates with providing the patient’s clinical care. This includes clinicians, in-house social workers and resource specialists, and administrative assistants for scheduling patient appointments. * Waiting to talk to member of care team |
| **11. Communication with 3rd parties or outside organizations** | * Communicating with 3rd party or outside organizations for coordinating patient services. These are parties who are not directly involved in patient care but may be involved in addressing patient social needs. Potential parties include insurances, social resources (e.g. food pantries, transportation services). Making an appointment on behalf of a patient at a social resource organization would fall in this category. |
| **12. Communication with other navigators** | * Contacting other TRIP navigators to see if a patient who cannot be contacted/is missing appointments has been seen at other hospitals. Contact can be by phone, REDCap Messenger, or other HIPAA-compliant method. * Coordinating a TRIP patient’s care with other TRIP navigators for patients who are receiving care at multiple institutions, seeking second opinions, or looking to transfer care. Contact can be by phone, REDCap Messenger, or other HIPAA-compliant method. * Contacting other TRIP navigators to coordinate care hand-off for a patient who transfer care between TRIP institutions. Contact can be by phone, REDCap Messenger, or other HIPAA-compliant method. |
| **13. Attempted patient contact and follow-up** | * Calling patient to attempt to reach patient after patient has missed appointment.   + If you reach the patient, please count the time conversing with the patient under the appropriate activity in Direct Patient Contact. * Searching Registry to see if patient has been seen at other TRIP sites.   + Count time conversing with other navigators under 12. Communication with other navigators. * Reaching out to patient’s support contacts * Conducting home visits (including travel time) * Sending letters to patient residence |
| **other TRIP-related tasks** | *Time spent on TRIP-related tasks, such as meetings, trainings, and trouble-shooting tools used for TRIP navigation.* |
| **14. Training/Education** | * Attending TRIP training meetings, TRIP navigator network meetings, or TRIP webinars. Includes travel time to and from off-site trainings and meetings. |
| **15. Cost Survey** | * Time spent filling out cost survey |
| **16-20. Other** | * Other TRIP navigation activities with TRIP patients that have not been listed above. List one activity per item and the time spent on each activity. |
| **# of TRIP Patients Navigated (number of individuals)** |  |
| **21. Number of TRIP patients navigated** | * Includes TRIP patients you worked with directly that day (e.g. interacted with them in-person or by phone) or did navigation work on their behalf (e.g. communicated with others on behalf of the patient, attempted to reach patient, etc.) |