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

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| *This is a list of example tasks for each navigation activity listed on the Survey of Supervisor 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. Documentation on behalf of TRIP patients** | * 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.)
* Viewing population-level reports in REDCap (e.g. Initial Patient Search, Patient Tracking Report)
* Viewing population-level reports or trackers in ExcelViewing other caseload management reports or trackers to monitor TRIP patient caseload and navigation activities
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| **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.* |
| **2. Direct navigation of TRIP patients** | * Speaking with patient in-person to get information for TRIP intake form
* Speaking with patient by phone to get information for TRIP intake form
* Speaking with patient in-person to administer standardized social needs assessment questions
* Speaking with patient by phone to administer standardized social needs assessment questions
* 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)
* 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
* Coordinating/scheduling patient appointments with patient and providers
* Rescheduling appointments for patients who missed an appointment
* Patient education around cancer care and social resources
* Emotional support around navigating cancer diagnosis/treatment or identified social needs
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| **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.* |
| **3. Communication related to TRIP patients** | * 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.
* 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.
* Contacting other TRIP navigators to see if a patient who cannot be contacted or 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.
* 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 2. Direct navigation of TRIP patients.
* Searching Registry to see if patient has been seen at other TRIP sites.
* Reaching out to patient’s support contacts
* Conducting home visits (including travel time)
* Sending letters to patient residence
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| **TRIP Supervision activities** | *Time spent on TRIP-related supervision tasks, such as meetings, trainings, and trouble-shooting tools used for TRIP navigation.* |
| **4. Patient Enrollment** | * Reviewing pathology reports to identify TRIP patients
* Reviewing upcoming appointments to identify TRIP patients
* Reviewing patient information in EHR to check eligibility criteria
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| **5. Administrative Supervision** | * Managing navigator time via meetings, trackers, reports, etc.
* Reviewing navigator workflows
* Preparing feedback for navigators
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| **6. Clinical Supervision** | * Meeting with navigators to discuss patient cases or clinic-related activities
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| **7. Quality Assurance** | * Monitoring data in Aunt Bertha or REDCap registry to ensure data completeness and accuracy
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| **8. Trainings** | * Attending TRIP trainings (in-person or webinar). Includes travel time to and from off-site trainings.
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| **9. Meetings** | * Attending TRIP meetings (in-person or webinar). Includes travel time to and from off-site meetings.
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| **10. Cost survey** | * Time spent filling out this cost survey
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| **11-15. Other** | * Other TRIP supervisor activities that have not been listed above. List an individual activity in each row and the time spent on that activity.
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