



CCSP | PFRC Navigation Script: Outpatient

- Prepare for the call by reviewing the assignment. Often the referral is for information on a particular subject or resource in addition to a complete barrier assessment.
- Maintain HIPAA compliance and confidentiality throughout the process.
- Use the technology app to place the call.
- To connect with the patient, you are required to make three attempts, on at least two separate days.
- **If you are unsure about anything, please don't hesitate to call us for help.**
- Use the following script:

Introducing Yourself/ General Information/ COVID Education

If no one answers, leave this message: *Hello my name is _____ and I am a (Volunteer Patient Navigator / Nurse Navigator / Staff Member) with UNC. I will call you back in 30 minutes and hope you will be available. To remain HIPAA compliant, do not leave any additional information on the answering machine, especially that you are calling from the cancer hospital.*

If someone does answer the call: *Hello my name is _____ and I am a (Volunteer Patient Navigator / Nurse Navigator / Staff Member) with UNC and I am calling for (name of patient).*

*It is nice to be talking with you. I want to be sure I have the right person on the line so can you please verify the **day** and the **month** of your birth only? I don't need the year of your birth. Dr. _____ asked me to give you a call to check in with you about a few things and to see how you are doing. Do you have a few minutes to chat right now? I also want to assure you that this conversation is completely confidential and will only be shared with your medical team if necessary.*

Start the conversation with general open-ended questions such as: *How are you doing? How are things going? May need to start with: The COVID pandemic and the restrictions have certainly make things more difficult- how is this going for you?*

Take this time to listen- *if they are willing, let them lead the conversation- you may get many of the questions answered.*

If the report directs you to cover a particular request then begin with that request. *For example, the medical team may have referred the patient for transportation needs. You can say: Your nurse navigator (or doctor) wanted me to call you about overnight housing.*

Where are you traveling from? How long will you need to be in the area? Here is what is offered...

Be prepared to share with them the information that you gathered on this topic before you called. Be prepared to tell them that you can do more research once you understand the need better and call them back.

While you may have been directed to discuss a particular topic- once that has been completed, begin to assess the other barriers. *While I have you on the line, I would like to ask you a few more questions to make sure that all of your needs are being taken care of. Do you have any questions about COVID and how you can protect you and your family?*

Give COVID self-isolation education: *You may be more at risk of COVID-19 or complications from COVID-19 because of certain medical conditions. Please make sure that you wear a mask when out in public, wash your hands frequently, social distance, notify your health care team if you develop a cough, fever, loss of taste or smell and also notify your medical team if someone you have been around has tested positive.*

***Use the COVID-19 Vaccine Supplement Insert here.**

COPING

- *Because these are such challenging times, we want to know how much stress you are having right now. On a scale from 0 to 10, where 0 is no distress at all and 10 is extreme distress, can you tell me what your level of distress is now? ____ Is it this number on most days? How do you feel like you are managing the challenges of the diagnosis and all that is happening these days?*
- **If the patient states a score of 5 or above then please ask:** *Would you like information on how exercise, coping, mindfulness or meditation can help lower your stress level? We also have counselors who will be glad to call you to give you further support.*
- **If the patient wishes to sign up for a therapist or a counselor, inform them to expect a call from an administrative assistant to arrange a counseling or therapy session. Visits are in-person or virtual depending on the counselor or therapist. Please confirm that they would like for the referral to be made. The referral will be made when you submit your report.**
- ***Important: If they report a distress score of 5 or above and they decline further assistance, check the following box in you report “Declines further interventions for distress”.**

- **Use this time to educate them on the CCSP services that apply to them.** *In addition to counselors, The CCSP (Comprehensive Cancer Support Program) has many programs that may benefit you. May I tell you about some of them that you may find helpful?*
- **This would be a great place to discuss the Caregiver Support Program.** You can provide the patient with the email address to request more information or we can make a referral.
- *If you provide me with your email address, I can put you on the list to receive emails from the Resource Center to keep you up to date with all of the latest offerings.*
- *Tell me about your home – I see that you live in _____ County. Do you live alone or with others? This question will lead to many areas of interest. If they live with someone and this person is helping to care for them, then please share information about caregiver support. UNC Caregiver Conversations Tuesday's at 2 pm (via zoom) or perhaps discussing other online or phone support resources.*
- *Do you feel good about the care you are getting at home? Do you feel safe with your partner? If they indicate they **do not** feel safe at home, then give them the phone number to the UNC Beacon Program. The Beacon Program is a UNC program dedicated to helping those experiencing a variety of interpersonal abuse. Beacon availability is M-F, 8am-5pm. On weekends, the number is 24 hrs. and goes to a pager. The **National Domestic Violence Hotline** is available 24/7 and the number is 1-800-799-7233. If you give situation arises in your barrier assessment, immediately call the PFRC staff so further follow up can be done.*

Transportation

- *How long does it take you to get to the hospital? Are you able to drive or do you have someone who comes with you?*
- *Do you have any problems getting here? This conversation will allow for someone to talk about transportation and a good chance to think about the gas card program- offered by the cancer hospital for those in active treatment who qualify. This fund can also help if someone has issues with their car- such as a need for new tires to get them here safely. If this patient has lung cancer they may be eligible for gas cards from the **Lung Cancer Initiative of NC**. You may add: *It is important for you to make all of your appointments to help get you the best outcome and if you are unable to get here, we may be able to offer some help so please let us know.**

Financial

- *Do you have any questions about bills you may have received from UNC? Insurance and billing can be very confusing. I can put you in touch with the Financial Navigators who can help you understand your bills and your specific insurance plan. Give them the Financial Navigator Hotline phone number for help in understanding insurance, medical bills and potential enrollment into copay programs to help offset the cost of certain medications. Let them know: When you call the financial navigator you will leave a message and they will call you back in 24-48 hours.*
- **You may also consider a referral to the outpatient Social Work team. Consider their diagnosis- there may be funds from disease specific resources. Refer to your *Quick Reference List* or the PFRC Google doc. Take notes so you can research other areas you can educate them about or connect them to available relief funds. A follow up call is recommended if you think there could be further information about specific funds and grants.**

Food Insecurity

- *How well are you eating? Are you able to drink enough fluids? Do you have an appetite? Cancer treatments often change the taste of foods or makes it difficult to eat the foods we like. Is this happening to you? Tell me more.*
- **Oncology Certified Dietitians are available, free of charge to our patients. We only have 2 Dietitians so we ask that do not freely offer them for what may be a simple issue. A patient should consider a consult if they report the following:**
 - **Unplanned weight loss (5 lbs./one week or 10 lbs./2 weeks or 20 lbs./one month)**
 - **Nausea, Vomiting, Diarrhea, Constipation**
 - **Tube feeding**
 - **Taste changes**
 - **Difficulty swallowing or chewing**
 - **Mucositis/esophagitis (swelling, redness, soreness and breakdown of lining of mouth)**
 - **Questions for healthy eating during treatment and general survivorship guidelines**
 - **Questions about vitamin/mineral/herbal supplements**
- **It is important to educate a patient that if they are unable to drink fluids, they need to let their medical team know.**
- **Then say... Since COVID, many people are having trouble getting food or being able to buy food. Is this a problem for you? Do you have enough food in your refrigerator for a week? If food insecurity is present- explore resources for food in their community using *Findhelp.org* to help you search. Also, if not already working with a Social Worker, request a referral for any additional resources to help. If working with a Social Worker, the case will be referred back to ensure that everyone is aware that the situation may have worsened.**

Medications

- *Have you been able to get your medications? If they answer no, explore further. Is it an issue of not being able to pick up the medicines? Is it the medical team has not called in the prescription? Is it an issue of money to pay for the medicines? If it is an issue of the medical team not calling in a medication or a refill, provide them with the number for the triage line and/or encourage them to send a MyChart message.*
- **If it is an issue with money- use this time to explore if they have been enrolled in our Pharmacy Assistance Program, if they have talked with one of our outpatient Social Workers or do they need a Financial Navigator who may be able to help them further and make the appropriate referral request.**

Side Effects

- *Are you having any side effects from the treatment that your doctor doesn't know about? (or) Are you having side effects from your treatment that concern you? Refer to the triage line to speak with their medical team. Encourage them to send a message via MyChart if they are a user. You may need to remind them you are unable to give any medical advice.*
- *Your medical team wants to know if you are experiencing side effects, especially if you have fever or other concerns you may have so they can best help you and make you feel better. Do you have a thermometer at home? **If they don't have a thermometer at home and they do not have a way that they can get one, please let them know to stop by the PFRC and ask for a free one.***

Advance Directives

- **The report form will note if Advance Directives are on file. If the patient has Advance Directives on file, you do not need to ask about this and you can move to the next section.**
- **If Advance Directives are not on file, a good way to lead into this conversation: *Many times when you come to the hospital you are asked about Advance Care planning because you do not have Advance Directives on file here at UNC. Do you have any questions about what Advance Directives are? I have time today to answer those questions for you. Advance Care Directives are legal forms that allow you to say how you want to be cared for if you are seriously ill. With these documents you can choose a person to be your Health Care Power of Attorney which is someone who will share your wishes with the health care team in the event you can't make your own decisions. A Living Will tells your family and the medical team what kinds of treatment you want near the end of your life when you can't speak for yourself.***

- If they want more information and they are coming to the hospital- tell them about the PFRC and where we are located. Let them know we have a packet of information which includes these legal documents – Include in the report how they would like this information. It is best if they come by the PFRC to pick up a packet because the onsite nurse navigator can answer any questions they have. This packet can also be mailed or emailed. If they are ready to complete Advance Directives and require help, you can inform them about our free services and request a referral on the report form.

Communications: (MyChart, next appointment, after-hours number, PFRC number)

- **MyChart:** The report form will note if they have activated MyChart. Many people have it but don't know how to use it. If they don't have an active MyChart be prepared to help them set one up. If they do, be prepared to provide a short tutorial if they report a lack of understanding.
- *I noticed that you are not signed up for MyChart. MyChart is a program that you can download on your smart phone or use on your computer to be able to communicate to your healthcare team. Is that something that you are interested in doing? I can help you with that!*
- *I noticed that you have a MyChart account set up, are you able to use it okay or are you having trouble using it? I can help you with that!*
- **Health Literacy:** *Do you have trouble filling out or completing health forms? We can help with that! Many patients are unable to complete forms due to vision, cognition or illiteracy. Let them know that we can arrange for someone (usually the Social Workers) to help them complete medical, disability or financial aid forms.*
- **Appointments:** *Do you know when your next appointment is at the cancer hospital? If no, refer to the triage line.*
- *Do you need information on how to get in touch with someone from your care team? If no, refer to the Triage line.*
- *Do you have the phone number for after-hours and weekends? **Provide the after-hours and weekend number and instruct them to ask for the oncologist on call.***
- **Ending the call:**
 - *It was so great to talk with you today. Is there anything that you would like us to know about or to share with the medical team? Do you have any questions for me?*

- *If something comes up before your next visit, please call us or visit us in the Patient and Family Resource Center. Our job is to help you with any non-medical needs.*
- *We are located in the lobby of the Cancer Hospital across from where you register. Our doors are closed due to COVID but just knock and we will let you in. (We have to make sure that we only allow a few people in at one time.)*
- *Ok then....is there anything else that you can think of as to how I can help you today? Thank you so much for your time. I hope you have a great day!*

Special Scripting

- **A patient that needs further help:** Depending on the needs identified you may need to say:
 - *You have given me several areas of concerns.*
 - *I would like to reach out to my team to get some more ideas and do some further research.*
 - *When would be a good time for me to call you back to share what I find? **this is the case call the VPN supervisor to discuss the issues, problem-solve and plan for the follow up phone call.***
- **A patient interested in Health Coaching, a CCSP program:**
 - *We have a health coaching program available to improve the experience of patients with cancer by trying to maintain physical function, reduce cancer-related symptoms, and meet your needs over time.*
If you were to participate, you would be assigned a personal health coach who would work with you for six months on physical activity, symptom management and other ways to help with your cancer experience.
*The program is currently being provided as a research study under the guidance of CCSP and will require consent in order to participate. Can we send your name and number to the program so someone can contact you? **If yes, please note on report form and Nurse Navigator will make the referral.***
- **A patient with a major complaint:** If the patient has complaints, be empathic and stay calm. **Don't take it personally or become defensive. Use blameless apologies and make statements like:**
 - *I wish that didn't happen to you. I hear what you are saying.*

- *I can't see you but it sounds like you are sad/angry/frustrated. It's unfortunate that happened.*
 - *I wish that had been a better experience for you.*
 - *If you feel you need to talk with someone about this problem, you can call Patient Relations. If this is the case call the VPN supervisor to discuss the issues, problem-solve and plan for the follow up phone call.*
- **A patient that needs further help:** Depending on the needs identified you may need to say:
 - *You have given me several areas of concerns.*
 - *I would like to reach out to my team to get some more ideas and do some further research.*
 - *When would be a good time for me to call you back to share what I find? If this is the case call the VPN supervisor to discuss the issues, problem-solve and plan for the follow up phone call.*
- **A patient that is in extreme distress/suicidal:** Stay calm and speak slowly and with an interested and empathetic tone. Be attentive, accepting and understanding. Don't be in a hurry to talk. If there is intense affect (crying, yelling etc.) let it quiet down before speaking. You can say:
 - *I can hear how upset (anxious) (depressed) (scared) you are right now and I want to help you. Since I am not a healthcare professional I want to get you to those who are trained to help you in the way you deserve. I really appreciate how open you have been with me about your experiences/how you have been doing.*
 - *Are you willing to call 911 or go the nearest emergency room? Allow time for them to process the information. If they tell you they won't call 911 or go to the nearest emergency room then say: There is help available on the phone with the National Suicide Prevention Lifeline and I want you to call them now. Their number is 1800-273-8255. Call the VPN Supervisor– Nurse Navigator immediately to relay the situation to the medical team.*
 - **Stay on the line and allow them to tell you what they plan to do. When you end the call let them know:** *I will reach out to my supervisor so she can let the medical team know what is going on. We want you to be safe and to get well.*
- **The patient who has died:** Our cancer population is very fragile and a patient may have died after the referral has been sent and the medical team is unaware. Apologize to the family member you are speaking with and explain:
 - *I am so sorry to hear this news. I did not get the notification from the UNC Health Care team yet as I do not have access to the chart and was not aware. If they allow and seem to want to discuss further:*

- *Would you like to tell me about _____? Were you able to be with them?*
 - *Have you been able to have some type of service or closure?*
 - *Are you alone? Who is your support? UNC does offer bereavement services if you are interested.*
 - *I can send you more information on support? **If they request further support, indicate this in your report and our team will call to further assess their needs.***
 - ***End the call: Please accept my sincere condolences and call us in the PFRC if you need any support. (or) Please accept my sincere condolences and know that one of the PFRC staff members will call you with more support information.***
- **The patient/caregiver that is sexually explicit, suggestive or inappropriate: If inappropriate comments are made, failure to set a clear boundary can be misconstrued as encouragement to escalate the inappropriate language. If the statement is clearly inappropriate then a firm response is required, such as:**
 - *Mr. Jones, I would like to continue to work with you but you cannot make comments like that again as it was inappropriate. If it continues, please end the call politely and notify the VPN- Nurse Navigator in the PFRC.*
 - ***If the statement was “gray” in nature and could be inappropriate in one way but maybe not in another, then change the subject; try to get the participant to focus on their stated needs. If it continues, proceed as above and inform the participant that the comments were inappropriate and end the call and notify VPN-Nurse Navigator.***