The UMMS Elder Patient Navigator Program: *Learning to Set Sail*

Program Details

October 2009

The Navigator Program is a new University of Massachusetts Medical School geriatric curricular initiative for medical students focused on health care encounters of older patients in the ambulatory setting. Students are paired with older patients, whom they “navigate” through their medical encounters to help them more fully understand their health problems and treatments. Through this pre-clinical immersive experience, students advance their geriatrics competencies in the understanding of the complexity of care for older patients with multiple chronic medical conditions, the skills of medication reconciliation and the engagement of family supports, and most importantly, how to communicate with older patients about their health problems. The Navigator Program was developed by the University of Massachusetts Medical School Advancing Geriatrics Education (AGE) program, which is supported by a grant from the Donald W. Reynolds Foundation.

This following overview serves as a program guide for implementing a successful Navigator Program.

**Program Objectives**

After completing the program, the medical student learner will be able to:

1. Consider the complexity of multiple medical co-morbidities, polypharmacy, involvement of family members and/or caretakers, and possible cognitive impairment when communicating with older persons in the ambulatory clinical setting.
2. Demonstrate how to accurately reconcile a patient’s medications, including prescribed, herbal, and over-the-counter medications.
3. Develop communication skills for effectively relating to older patients and apply them during their clinical years.
4. Weigh standard recommendations for health screenings and treatments with the age, functional status, and the goals of care for their older patients.
5. Reflect upon the psychological, social, and spiritual needs of their patients with advanced illness and their family members.
6. Recognize health literacy issues affecting older patients.

**Glossary of terms**

- **Student Navigator** – A first or second-year medical student who has been formally trained as a Navigator.
- **Prospective Navigator** – A first or second-year medical student poised to receive training by an already-trained Student Navigator.
- **Student Navigator Leader** – A second year medical student charged with the day-to-day management of the Navigator Program, orientation of Prospective Navigators, and the collection of all evaluation forms. At the University of Massachusetts Medical School, the Student Navigator Leader also serves as one of the co-leaders of our student-led Geriatrics Interest Group.
• **Faculty Advisor** – A faculty member in the Division of Geriatric Medicine, responsible for bi-monthly meetings with the Student Navigator Leader, ad hoc advising for general problem-solving, mentoring for student leadership development, and oversight of data collection and analysis. Faculty Advisors also meet regularly with Student Navigators to elicit feedback and offer advice.

• **Participating physicians** – A physician practicing in the ambulatory clinical setting, agreeing to have his/her patients “navigated” by a Student Navigator.

**Program Description and Rationale**

Research and clinical experience have consistently suggested that patients do not retain most of what their healthcare provider tells them during an appointment. This common problem in medical practice is particularly relevant to older patients, who often are provided with an overwhelming amount of information during a brief clinical encounter – more information about illnesses, medications, adverse effects from medications, and possible interventions. Improving communication between physicians and older patients (and their families and caregivers) can be pivotal for ensuring better outcomes.

The Navigator Program pairs an older patient with a trained medical student (a Student Navigator), who accompanies assigned patients to their medical appointments. The Student Navigator serves as the proverbial “fly on the exam room wall”: the student quietly observes the patient-doctor interaction, taking notes on their older patient’s vital signs, weight, lab/test results, additional key information provided during the appointment, and any changes to the medication regimen. Afterwards, the Student Navigator meets with the patient to summarize the visit and review the physician’s plan for follow-up. The Student Navigator’s notes and an updated medication list are provided to the patient for their future reference. Evaluation forms from the patients, Student Navigators, and participating physicians are collected by the Student Navigator Leader and then tabulated and analyzed by our Medical School’s Division of Research and Evaluation.

**AAMC and John A. Hartford Foundation Geriatric Competencies for Medical Students Addressed by the Navigator Program**

• **Medication Management** A Student Navigator is responsible for reconciling a patient's medications before and after their older patient’s appointment. Students document a patient’s complete medication list, including prescribed, herbal, and over-the-counter medications.

• **Health Care Planning and Promotion** Student Navigators will reflect upon how to balance standard health screenings and treatments with a patient’s age, functional status, life expectancy, and goals of care during their clinical encounters.

• **Advanced Illness:** Student Navigators will consider the psychological, social, and spiritual needs of their patients with advanced illness and their family members as well as be able to link these needs with the appropriate interdisciplinary team members.

**Getting Started – Recruitment**

• **Faculty Advisors:** Faculty Advisors work closely with medical students involved in the Medical School’s Geriatrics Interest Group (GIG). One GIG student is appointed the Student Navigator Leader and Faculty
Advisors meet bi-monthly with the Student Navigator Leader to offer counsel, review the past month’s Navigator data, and discuss recent evaluation data from students, patients, and faculty. A Student Navigator Resource Handbook is developed by the Faculty Advisors and distributed to new Student Navigators with relevant articles in the areas of effective older patient-physician communication, polypharmacy in the elderly, and the burden of multiple co-morbidities on older patients.

- **Medical Student Champions:** One of the keys to success in piloting the Navigator Program at our Medical School was the early involvement of a student champion, a GIG co-leader who initially conceived of the project. GIG leaders have continued as the Student Navigator Leader, the student in charge of the day-to-day management of the program, orientation of Prospective Navigators, and collecting and collating evaluation data. To encourage and support these student champions, the co-leaders of the GIG receive a modest stipend through our Reynolds grant, partly for their efforts in leading the Navigator Program.
  - Medical student leadership is central to the program, which is designed to promote student leadership development through the mentorship of the Faculty Advisors. To ensure the ongoing training of new Student Navigators, a “train-the-trainer” model is used, with second-year Student Navigators responsible for training entering first year Student Navigators. Students are recruited through GIG-sponsored lunches and presentations at student group meetings, and by direct recruitment of classmates by the GIG leaders and members.

- **Outpatient Clinic Sites:** Initially, we recommend piloting the Navigator Program at a single outpatient clinic site especially receptive to the goals of the program. We identified the physician director of a specialty clinic who has been supportive of geriatrics education. The clinic director recruited other clinic physicians to participate in the program. Faculty Advisors and Student Navigator Leaders meet with all clinic staff, including the nurse manager, nurses, medical assistants, and the desk staff. Space is also an important consideration in clinic choice to guarantee privacy for the student and patient to meet after the doctor’s visit and should be actively sought.

- **Recruiting Older Patients:** Patients are recruited through diverse outreach efforts including GIG leader presentations at local senior centers and the distribution of English-Spanish bilingual brochures, both as part of these presentations as well as in the participating clinics. An email account and a telephone number with voice mail have been set up for patients to conveniently request a Student Navigator. The Student Navigator Leader is responsible for monitoring both the email and voicemail accounts as well as the follow-up phone calls to patients confirming arrangements for an assigned Student Navigator to be present at an upcoming appointment. Participating physicians can also identify patients in their practice they believe would benefit from the Navigator Program and notify the Student Navigator Leader. Such patients are contacted by Student Navigators several days prior to their scheduled appointment to determine if they would like to participate in the program.

### Responsibilities of the Student Navigator During Clinic Visits

- Meet patient 15 minutes before their scheduled visit during the registration process.
- Accompany the patient into the examination room. Observe the patient-doctor interaction and the physical exam, taking structured notes using a specially-designed template.
- After the visit, the Student Navigator and the older patient “debrief” in a private area of the office to review and clarify key points of the visit, their patient’s vital signs, weight, lab/test results, and any changes to their medication regimen.
• The Student Navigator provides the patient and/or family member with a copy of the Navigator notes from the visit and a fully reconciled medication list.

• Patients are asked to complete an evaluation form, which may either be completed and returned to the Student Navigator at the end of the session or later mailed to the Student Navigator Leader in a self-addressed stamp envelope provided to the patient. The Student Navigators are responsible for returning completed evaluation forms to the Student Navigator Leader, who oversees the collection of all evaluation data. The Student Navigator also completes an evaluation of the visit and returns it to a box in the clinic doctor’s office to be regularly collected by the Student Navigator Leader. The Student Navigator Leader is also responsible for collecting monthly evaluations from participating physicians. After collecting all these various forms, the Student Navigator Leader is responsible for forwarding all the evaluation data to the Division of Research and Evaluation.

Student Navigator Training Using a “Train-the-Trainers” Model

• Navigator training orientation materials are provided to students upon their enrollment by the Student Navigator Leader. These materials include a template for note-taking and a Student Navigator Resource Handbook, which includes a series of relevant articles (currently still in development). An already-trained Student Navigator trains the Prospective Navigator by jointly attending a Navigator session and offering feedback on their patient interaction.

• The experienced Student Navigator reviews the novice Student Navigator’s appointment summary and medication list after the visit and gives specific feedback on their interaction with the patient and the notes provided.

• Upon completion of the training program, the newly trained Student Navigator can then train other Prospective Navigators.

Evaluation

There are four Pilot Program Evaluation forms utilized by the Navigator Program:

1. Student Survey: A form provided to the Student Navigator after every patient encounter that assesses medical students’ comfort level in communicating with older patients about their health; students’ understanding of how to advocate for older patients; students’ appreciation for chronic disease management in older adults; students’ understanding of how to balance standard screening and treatment recommendations with the age, functional status, and the goals of care for their older patients; and students’ ability to identify the psychological, social, and spiritual needs of their patients with advanced illness and their family members.

2. Patient Survey: A form provided to the patient after every Student Navigator encounter that assesses patients’ comfort level in working with Student Navigators and whether patients felt more capable of understanding and following their doctor’s advice after having been navigated.

3. Provider Survey: A form provided to participating physicians once a month that assesses participating physicians’ comfort level in working with student Navigators and whether physicians felt the Navigator helped deliver better care to their patients.

4. Overall Student Survey: A form provided to the Student Navigator at the end of each semester that assesses medical students’ overall experiences with the Navigator Program.
a. Both quantitative and qualitative data are tabulated by the Medical School’s Division of Research and Evaluation.
b. A Faculty Advisor meets monthly with the Student Navigator Leader to review the previous month’s data and any feedback from Student Navigators.

Materials

- Patient recruitment brochures in English/Spanish, bilingual formats.
- Student Navigator Resource Handbook, which includes Navigator orientation materials for students with a syllabus of relevant articles (currently in development).

Charting ahead …:

- We initiated the Navigator Program with a medical specialty clinic and are now expanding the program to primary care offices. Students would contrast the different communication styles/challenges employed by primary providers and specialists. Additional features will be an “exit interview” with the patient (and family) to discuss their mutual experiences in the program, and how the Navigator Program influenced their own communication style and outlook before the student entered their residency.
- We are now setting up mechanisms to have Student Navigators follow at least one of their older patients throughout their medical school years – thereby allowing the student a chance to better appreciate the challenges facing an older patient navigating the health care system. We are striving to have students write a journal to reflect upon their Navigator experiences.

If you have questions about the Navigator Program, please contact Mary Ellen Keough, MPH at MaryEllen.Keough@umassmed.edu, or visit us at http://umassmed.edu/AGE/index.aspx.