

Enhanced Patient Navigation for Retention of Women of Color — •

START-UP PHASE

Goal 1 Preparation for Intervention Implementation

Objective 1.1 Establish Expectations and Working Relationships with the Implementation Technical Assistance Center (ITAC), Dissemination and Evaluation Center (DEC) Intervention Leads, and Technical Assistance (TA) Content Experts

| Activity | Completion Date | Responsible Parties | Potential Barriers | TA Strategies |
|--|-----------------|-------------------------------|--|-----------------------------------|
| a) Review the intervention protocol. | 5/15/16 | ITAC, TA Content Experts, DEC | Scheduling conflicts | Conference calls/ Webinars |
| b) Review and compile a list of tools to be used by Intervention Staff during the implementation phase, including the acuity scales, care plans, case study templates, and a data dictionary. | 6/15/16 | ITAC, TA Content Experts, DEC | Scheduling conflicts | Conference calls/ Webinars |
| c) Plan for the convening agenda and performance site trainings. | 6/15/16 | ITAC, TA Content Experts, DEC | Scheduling conflicts | Conference calls/ Webinars |
| d) Schedule monthly ITAC Lead and TA Content Expert “check-in” calls and/or meetings. | 6/15/16 | ITAC, TA Content Experts | Scheduling conflicts | Onsite meetings/ Conference calls |
| e) Performance sites meet with ITAC Intervention Lead and review implementation plan and TA agenda, inclusive of site visit protocols. | 7/1/16 | ITAC | Scheduling conflicts; delay in funding agreement | Onsite meetings |
| f) Performance sites meet with DEC Intervention Lead and review multisite evaluation (MSE) plan; identify MSE data collection and reporting procedures; establish MSE reporting timeline; identify MSE TA needs. | 7/1/16 | DEC | Scheduling conflicts; delay in funding agreement | Onsite meetings/ Conference calls |
| g) Onsite, multisite, and conference call meeting schedules are established between performance sites and ITAC, DEC, TA Content Experts. | 7/1/16 | ITAC | Scheduling conflicts | Onsite meetings/ Conference calls |

Objective 1.2 Identify Additional Training and Support Needs

| Activity | Completion Date | Responsible Parties | Potential Barriers | TA Strategies |
|--|-------------------|-------------------------------|--|-----------------------------------|
| a) Conduct functional assessment to determine training and TA support needs related to implementation of the intervention model, relationship building and strengthening, use of acuity tools, work flow efficiency, and integration of patient navigation with existing programs. | 7/1/16 | ITAC, TA Content Experts, DEC | Scheduling conflicts; delay in funding agreement | Onsite assessment |
| b) Provide TA support to assess staffing needs, hiring protocols, and deadlines. | 7/1/16 | ITAC, TA Content Experts, DEC | Personnel policies | Onsite assessment |
| c) Provide TA support to assess protocol needs related to: referrals, safety and boundary issues, patient intake/assessment, and confidentiality/Health Insurance Portability and Accountability Act (HIPAA). | 7/1/16 | ITAC, TA Content Experts, DEC | Scheduling conflicts; delay in funding agreement | Onsite assessment |
| d) Provide TA support to assess current comprehension and use of electronic medical records (EMRs), and areas in need of improvement. | 7/1/16 | ITAC, TA Content Experts, DEC | Lack of knowledge and use of EMR | Onsite assessment |
| e) Provide TA support to assess and address internal/ external gaps in services. | 8/31/16 – ongoing | ITAC, TA Content Experts, DEC | Scheduling conflicts | Onsite meetings/ Conference calls |
| f) Review National HIV/AIDS Strategy (NHAS) with performance site and assess what elements of the strategy the intervention will address. | 7/1/16 | ITAC, TA Content Experts, DEC | Unfamiliarity with the NHAS | Onsite meeting/ Convening |

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Goal 2 Provide Necessary Training to Implement Intervention

Objective 2.1 Train Project Staff and Agency Leadership

| Activity | Completion Date | Responsible Parties | Potential Barriers | TA Strategies |
|---|-----------------|-------------------------------|--|--|
| a) Train staff on intervention protocols and components. | 8/26/16 | ITAC, TA Content Experts, DEC | Lack of knowledge of specific program model | Webinar/Convening/ Conference calls |
| b) Train intervention staff and management in theoretical basis for intervention and assess management's buy-in. | 8/26/16 | ITAC, TA Content Experts, DEC | Unfamiliarity with theoretical bases for interventions and use of social and behavioral theories | Webinar/Convening |
| c) Train supervisory staff on how to work with and supervise Patient Navigators. | 9/30/16 | ITAC, TA Content Experts, DEC | Unfamiliarity with working with Patient Navigators | Webinar/Convening/ Conference calls |
| d) Train intervention staff and management on network of care needed for comprehensive support for program participants, including: establishing community referral networks and creating and tracking comprehensive memorandum of understanding (MOUs) that include timelines for referrals and MOU renewal protocols. | 8/26/16 | ITAC, TA Content Experts, DEC | Culture of local service area related to collaboration vs. competition | Onsite training/ Convening/ Conference calls |
| e) Train staff in strategies for establishing staff integration, such as intervention team meetings, supervision protocols (clinical/administrative), and strategies for integrating Patient Navigators into the clinical team. | 9/30/16 | ITAC, TA Content Experts, DEC | Organizational capacity, culture, and protocols | Onsite training/ Convening/ Conference calls |
| f) Train Data Manager in MSE data collection and reporting. | 8/26/16 | DEC (with support from ITAC) | Unfamiliarity with Boston University database | Webinar/Convening |
| g) Train Project Manager on using FoundationConnect for submission of program reports. | 8/26/16 | ITAC | Unfamiliarity with FoundationConnect | Webinar/Convening |
| h) Train Project Manager on federal funding compliance requirements and AIDS United financial procedures. | 8/30/16 | ITAC | Lack of organizational capacity and systems | Training/Provide AIDS United grantee manual |

Goal 3 Provide Support for Local Institutional Review Board (IRB) Approval

Objective 3.1 Advise and Provide Templates for IRB Application

| Activity | Completion Date | Responsible Parties | Potential Barriers | TA Strategies |
|--|-------------------------------------|------------------------------|--|------------------|
| a) Provide training on applying for and securing IRB approval. | 6/15/16 | DEC (with support from ITAC) | Logistics with scheduling | Webinar |
| b) Conduct follow up with each site on progress with IRB. | 9/30/16 | DEC (with support from ITAC) | Delays with IRB process | Conference calls |
| c) Determine if annual IRB renewals are secured | 9/30/2016 9/30/2017 9/30/2018 | DEC (with support from ITAC) | Unfamiliarity with the renewal process | Conference calls |

Enhanced Patient Navigation for Retention of Women of Color — •

INITIAL IMPLEMENTATION PHASE

Goal I Implementation and Capacity Building

Objective I.1 Train Project Staff

| Activity | Completion Date | Responsible Parties | Potential Barriers | TA Strategies |
|--|-------------------|--------------------------|---|---|
| a) Conduct training needs assessment with staff, inclusive of knowledge of the HIV Care Continuum in their geographic area. | 9/30/16 – ongoing | ITAC, TA Content Experts | Scheduling conflicts | Onsite assessment/ Online survey |
| b) Train supervisory staff to teach Patient Navigators the protocol. | 11/30/16 | ITAC, TA Content Experts | Unfamiliarity with the protocol | Onsite meetings/ Webinars/ Convening |
| c) Train intervention staff on the intervention curriculum as well as key areas of patient navigation, such as motivational interviewing, coaching, and mentoring of patients. | 11/30/16 | ITAC, TA Content Experts | Unfamiliarity with subject areas | Onsite training/ monthly conference calls |
| d) Train staff on strategies for supporting the integration of Patient Navigators into the clinical team and on case conferencing protocols. | 11/30/16 | ITAC, TA Content Experts | Challenges with organizational culture and protocols | Onsite training/ Webinars/ Conference calls |
| e) Train staff in areas that support patient navigation activities, including: cultural humility; stigma around HIV and drug use; issues of race, ethnicity, and privilege; and other socioeconomic issues. | 11/30/16 | TA Content Experts | Unfamiliarity with subject areas | Onsite training/ Webinars |
| f) Conduct trainings on gender-specific psychosocial experiences of women of color, including but not limited to advocating for children; engagement of the legal, health care, and school systems; and issues related to gender-based violence, such as trauma-informed care, post-traumatic stress disorder (PTSD), and its impact on treatment adherence. | 11/30/16 | ITAC, TA Content Experts | Unfamiliarity with subject areas | Onsite training/ Conference calls |
| g) Train staff/community partners in HIV medical case management; HIV 101; antiretroviral therapies; treatment compliance; and stigma related to HIV status, drug use, and other areas. | 11/30/16 | ITAC, TA Content Experts | Unfamiliarity with subject areas | Onsite training/ Conference calls |
| h) Train staff in assessing gaps in services and building community partnerships. | 11/30/16 | ITAC, TA Content Experts | Lack of experience is building community partnerships | Onsite training/ Conference calls |
| i) Train staff in the use of the EMR. | 11/30/16 | ITAC, TA Content Experts | Lack of experience with EMR | Onsite training/ conference calls |

Objective I.2 Evaluation Preparations

| Activity | Completion Date | Responsible Parties | Potential Barriers | TA Strategies |
|---|-----------------|-------------------------|----------------------------------|---|
| a) Prepare agenda/material for training at first DEII convening. | 7/30/16 | DEC (support from ITAC) | Scheduling conflicts | Conference calls |
| b) Establish standard call between Intervention Staff and DEC. | 7/30/16 | DEC (support from ITAC) | Scheduling conflicts | Onsite meeting |
| c) Provide support to secure technology (laptops/tablets) and Internet capacity. | 8/30/16 | DEC, ITAC | Lack of organization capacity | Onsite meeting/ Conference calls |
| d) Train management on DEC evaluation protocols regarding collecting and submitting data and forms. | 8/30/16 | DEC (support from ITAC) | Unfamiliarity with DEC protocols | Onsite meeting/ Conference calls/ Convening |

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Objective 1.3 Staff Development

| Activity | Completion Date | Responsible Parties | Potential Barriers | TA Strategies |
|---|--------------------|--------------------------|--|--|
| a) Provide training on identification, assignment, and initial outreach strategies for patients eligible for Patient Navigation services. | 11/30/16 | ITAC, TA Content Experts | Unfamiliarity with the model | Onsite meeting/ Conference calls |
| b) Train staff in implementing the initial intervention components (e.g. assessment, patient care plan) outlined in the grantee manual. | 11/30/16 | ITAC, TA Content Experts | Unfamiliarity with the model | Onsite meeting/ Conference calls/ Webinars |
| c) Train staff in health education material and protocols for conducting sessions with patients. | 11/30/16 | ITAC, TA Content Experts | Unfamiliarity with health education material | Onsite meeting/ Conference calls/ Webinars |
| d) Train staff in service coordination, resource development, patient advocacy, and protocols for crisis management and staff safety. | 11/30/16 – ongoing | ITAC, TA Content Experts | Unfamiliarity with subject areas | Onsite meeting/ Convening/ Conference calls/ Webinars |
| e) Train staff in the components of action plan monitoring, inclusive of case conferencing. | 11/30/16 | ITAC, TA Content Experts | Unfamiliarity with patient monitoring | Onsite meeting/ Conference calls/ Webinars |
| f) Train staff in supervision goals and objectives. | 11/30/16 | ITAC, TA Content Experts | Challenges with organizational culture and protocols | Onsite meeting/ Conference calls |

Goal 2 Provide Ongoing Support for Implementing Sites

Objective 2.1 Ensure Collaboration and Sharing of Strategies Across Sites

| Activity | Completion Date | Responsible Parties | Potential Barriers | TA Strategies |
|--|--------------------|-------------------------------|----------------------|------------------|
| a) Facilitate sharing of successes, challenges, and strategies among implementing sites. | 11/30/16 – ongoing | ITAC, TA Content Experts, DEC | Scheduling conflicts | Conference calls |

Objective 2.2 Track Program Outcomes

| Activity | Completion Date | Responsible Parties | Potential Barriers | TA Strategies |
|--|--------------------|-------------------------|--|-------------------------------|
| a) Provide support to staff in referral tracking systems, continuity of care, and coordination with community referrals. | 11/30/16 – ongoing | DEC (support from ITAC) | Unfamiliarity with structured tracking systems | Conference calls/ Webinars |
| b) Provide support and training in the areas of data tracking and cleaning and standardizing information flow from the EMR. This includes mapping chart collection to a location in the EMR. | 11/30/16 – ongoing | DEC (support from ITAC) | Unfamiliarity with data collection protocols | Conference calls/ Webinars |
| c) Conduct quality assurance reviews. | 11/30/16 – ongoing | DEC (support from ITAC) | Scheduling conflicts | Site visit |

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MAINTENANCE PHASE

Goal 1 Provide Ongoing Support for Implementing Sites

Objective 1.1 Ensure collaboration and sharing of strategies across sites

| Activity | Completion Date | Responsible Parties | Potential Barriers | TA Strategies |
|--|-----------------|-------------------------------|----------------------|------------------|
| a) Facilitate sharing of successes, challenges, and strategies among implementing sites. | ongoing | ITAC, TA Content Experts, DEC | Scheduling conflicts | Conference calls |

Objective 1.2 Share Impact of Intervention Across Sites

| Activity | Completion Date | Responsible Parties | Potential Barriers | TA Strategies |
|---|-----------------|-------------------------------|--|----------------------------|
| a) Share national evaluation data as available. | ongoing | ITAC, TA Content Experts, DEC | Lag time until sufficient data is collected to share | Conference calls/ Webinars |
| b) Sites will share case studies of participants served through the intervention, as well as staff experiences. | ongoing | ITAC, TA Content Experts | Unfamiliarity with case study presentation format | Conference calls/ Webinars |

Goal 2 Ensure Continuity and Fidelity to Program Model through Staffing Changes

Objective 2.1 Provide Training for New Staff

| Activity | Completion Date | Responsible Parties | Potential Barriers | TA Strategies |
|---|---|---------------------|--|--|
| a) Schedule training with all new staff to include an overview of key intervention elements and evaluation. | Within one month of a staff member's start date | ITAC, DEC | Challenges with organizational culture | Requirement of implementing sites to be included in grantee manual |

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PROGRAM INTEGRATION PHASE

Goal I Planning for Integration of Program Model

Objective 1.1 Assess Organizational Sustainability, Including Integration of the Patient Navigation Intervention

| Activity | Completion Date | Responsible Parties | Potential Barriers | TA Strategies |
|--|-----------------|-------------------------------|--|---|
| a) Provide access to structured sustainability assessment tools. | 5/30/18 | ITAC, TA Content Experts, DEC | Lack of specific funding to continue intervention | Washington University's Program Sustainability Assessment Tool/ Webinar |
| b) Provide TA support to explore future Medicaid reimbursement for Patient Navigator services and obtaining billing codes, if applicable. | 5/30/18 | ITAC, TA Content Experts, DEC | Unfamiliarity with billing protocols; state restrictions | Onsite assessment/ Convening/ Conference calls |
| c) Provide individualized coaching on maintaining intervention, inclusive of role of front desk staff to identify potential recipients of patient navigation services, intra-organization conferencing, and the permanency of a "patient navigation" field in the EMR. | 12/20/18 | ITAC, TA Content Experts | Lack of motivation to sustain intervention | Onsite meeting |

Objective 1.2 Assess Impact of Intervention Implementation

| Activity | Completion Date | Responsible Parties | Potential Barriers | TA Strategies |
|--|-----------------|---------------------|---|-------------------------------|
| a) Conduct qualitative interviews with Intervention Staff, key stakeholders, and patients. | 5/30/19 | ITAC, DEC | Lack of specific funding to continue intervention | Onsite meeting/ Online survey |