ATLANTA EMA QUALITY MANAGEMENT STANDARDS AND MEASURES
PATIENT NAVIGATION SERVICES

Purpose
The purpose of the Ryan White Part A quality management standards and measures is to ensure that a uniformity of service exists in the Atlanta Eligible Metropolitan Area (EMA) such that the consumers of a service receive the same quality of service regardless of where the service is provided. If an agency is unable to meet a particular standard, the agency must document why the standard was unable to be met and explain the steps it is taking to meet that standard.

Definition
Patient Navigation services are services provided by Patient Navigators that include the provision of psychosocial support to increase client medical adherence and retention in HIV/AIDS care services among clients most at risk for non-medical adherence by guiding clients through their initial medical assessment and enrollment into care. Patient navigation services provide emotional support to clients who receive a preliminarily positive and/or new confirmatory HIV/AIDS diagnosis, and clients identified as most at risk for non-adherence to medical services. Patient navigation services do not involve coordination and/or follow up of medical treatment. In addition, patient navigation services are distinct from medical case management, mental health, substance abuse treatment, case management (non-medical) and peer counseling services.

Patient Navigators are non-licensed, paraprofessional individuals who are living with HIV and trained according to Atlanta EMA Patient Navigation Program standards. They are current or former recipients of HIV healthcare services who provide direct services to consumers in the health center setting or by phone based upon clinic, patient scheduling needs and patient navigator's work schedule. A patient navigator must:

1. Be trained according to the Atlanta EMA standards

2. Be integrated in the HIV/AIDS multidisciplinary healthcare team and will participate in pre-clinic meetings or case conferencing sessions

3. Be able to complete all paperwork required by the position

4. Have the following skills or knowledge:
   - Good verbal and written communication skills
   - Good listening skills
   - Good interpersonal skills
   - Good problem solving skills

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Application of Standards

These standards apply to all agencies that are funded to provide patient navigation services. If an agency would like to view sample policy and procedures, including ethics contracts, please contact the Grantee's office.

Standards Development Process

The standards were developed through extensive background research on quality management standards, a review of existing standards from other Ryan White Part A EMAs, training programs designed by Cicatelli Associates, Inc., meetings of the Patient Navigation Task Force and meetings with the Ryan White Part A Grantee.

Acknowledgements

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I. Policies and Procedures	
Standard	**Measure**
A. Agency must have policies and procedures in place that address confidentiality (HIPAA), grievance procedures and supervision requirements per federal and state law.	• Policy and procedure manual • Grievance procedure posted in visible location
B. Agency has eligibility requirements for services in written form. This is inclusive of: ✓ Clients rights and responsibilities ✓ Release of information/confidentiality ✓ Eligibility for services	• Policy on file
C. Agency is licensed and/or accredited by the appropriate city/county/state/federal agency.	• Current licensure on file from appropriate city/county/state/federal agency

D. Agency has written policies and procedures in place that protect the physical safety and well-being of staff and clients. This is inclusive of:
✓ Physical agency safety
   • Meets fire safety requirements
   • Complies with Americans with Disabilities Act (ADA)
   • Is clean, comfortable and free from hazards
   • Complies with Occupational Safety and Health Administration
	• Policy on file
	• Site visit

(OSHA) infection control practices
✓ Crisis management and psychiatric emergencies
    • How to assess emergent/urgent vs. routine need
    • Verbal intervention
    • Non-violent physical intervention
    • Emergency medical contact information
    • Incident reporting
    • Voluntary and involuntary inpatient admission
✓ Refusal of services
✓ Personnel
    • Roles and responsibilities of staff, including supervision responsibilities and staff/client ratio
    • Ethics contract on personal boundaries (encompassing physical, emotional, spiritual & financial)
✓ Client/Parent/Guardian Rights and Responsibilities (see Standard IV)	

E. Agency has a formal relationship with a mental health/substance abuse professional for consultation as needed if a mental health/substance abuse professional is not on staff.	• Written letter of agreement on file

I.   Policies and Procedures (continued)

Standard	Measure
F. Agency has private, confidential office space for seeing clients (e.g. no half-walls or cubicles, all rooms must have doors).	• Site visit
G. Patient navigation staff at an agency must complete a patient navigation training course from a grantee approved site(s). Training should consist of the following: ✓ Confidentiality (HIPAA) ✓ Clinic tour, clinic hours and access ✓ Introduction to clinic staff/description of staff roles ✓ Staff contact information ✓ Computer access and email policies ✓ Phone system/voice mail system ✓ Timesheet/invoice/payroll process ✓ Fire and emergency procedures ✓ Review and discussion of Patient Navigator Program Policies and Procedures manual ✓ Discussion of the target populations, process for identifying and referring	• Training records in personnel files

clients to patient navigators, and primary activities for patient navigators ✓ Procedures for health center services ✓ General understanding of how the Atlanta EMA Ryan White system of HIV continuum of care operates	

II. Program Staff	
Standard	**Measure**
A. To the greatest extent possible, patient navigation staff are HIV positive.	• Written job description that includes roles and responsibilities signed by staff and supervisor in personnel files
B. Patient navigation staff have appropriate skills, relevant experience, cultural and linguistic competency, knowledge about HIV/AIDS and available health and social service related resources.	• Staff résumés in personnel files • Training records in personnel file • Client satisfaction survey
C. Patient navigation staff have a clear understanding of their job description and responsibilities as well as agency policies and procedures.	• Written job description that includes roles and responsibilities and a statement of having been informed of agency policies and procedures on file signed by staff and supervisor
D. Patient navigation staff sign an ethics contract on personal boundaries.	• Signed ethics contract in personnel file
E. Patient navigation staff must complete initial training prior to providing direct services to clients (See minimum training requirements under Policies and Procedures in I. G.).	• Signed form attesting to completion of training in personnel file • Signed confidentiality agreement in personnel file
F. Patient navigation staff participate in at least 10 hours of job-related education/training annually.	• Training/education documentation in personnel files
G. Patient navigation staff shall receive weekly supervision by the Patient Navigation Supervisor. Supervision shall consist of providing support, allow opportunities to discuss work issues and provide Patient Navigation staff with direction for his or her job.	• Personnel files

III. Access to Services	
A. Agency is accessible to desired target populations. Accessibility includes: ✓ proximity to community ✓ proximity to mass transit	• Site visit • Agency client data report consistent with funding requirements

✓ proximity to low-income individuals
✓ proximity to underinsured or uninsured individuals
✓ proximity to individuals living with HIV

III. Access to Services (continued)	
Standard	**Measure**
B. Agency demonstrates the ability to provide culturally and linguistically competent patient navigation services according to Atlanta EMA standards for desired target population	• Personnel and training records • Site visit/program monitoring • Client satisfaction survey • Agency client data report consistent with funding requirements
C. Agency demonstrates input from clients in the design and delivery of patient navigation services.	• Existence of Consumer Advisory Board (CAB) Client satisfaction survey
D. Agency is compliant with ADA requirements for non-discriminatory policies and practices and for the provision of reasonable accommodations to address communication (i.e. sign language interpreter).	• Policy on file
IV. Service Coordination/Referral	
A. Agency staff acts as a liaison between the client and other service providers to support coordination and delivery of high quality care. For those clients not in primary medical care, agency staff must note progress towards linking the client into primary medical care.	• Client record – documentation of with whom staff are communicating and progress to linking client to primary care if appropriate • Agency client data report consistent with funding requirements • Policy on file
V. Clients' Rights and Responsibilities	
A. Client confidentiality policy exists for all service settings.	• Policy on file
B. Grievance policy exists.	• Policy on file
C. An up-to-date release of information form exists and is signed by the client.	• Policy on file • Client record, specifically a current release of information signed by client
D. Client will be informed of the client confidentiality policy, grievance policy, their rights and responsibilities and their eligibility for services.	• Documentation in client chart initialed or signed by client (chart review) showing that they have read or been informed