

Preoperative Assessment: Perianesthesia Nurse Navigator

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Historical Perspective

- 1971- Richard Nixon- National Cancer Act
 - Disparity in access to treatment due to economic, social and cultural factors
 - Timely access from dx to ttt
- 1990 1st- Patient Navigation program-
 - Dr. Harold Freeman- Harlem, New York City
 - Eliminate barriers: financial, communication/information, medical, emotional
- Highlights of Patient Navigation
 - Patient- centered healthcare service delivery model
 - Core function- elimination of barriers to timely care
 - One on one relationship between the navigator and the patient
 - Services- cost effective
 - Differentiate the role from other providers in the system- ex- social worker
- 2005- Patient Navigator and Chronic Disease Prevention Act (HOUR 1812) signed into law by Pres. Bush

Freeman, H. P., & Rodriguez, R. L. (2011). History and principles of patient navigation. *Cancer*, 117(15 Suppl), 3539-3542. <https://doi.org/10.1002/cncr.26262>

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Barriers in healthcare

- Patient Level
 - Responsibilities- work and family
 - Education
 - Language
 - Cultural
- Provider Level
 - Availability
 - Communication
- System Level
 - Insurance coverage
 - Financial
 - Transportation

Allen, E. M., Call, K. T., Beebe, T. J., McAlpine, D. D., & Johnson, P. J. (2017). Barriers to Care and Health Care Utilization Among the Publicly Insured. *Medical care*, 55(3), 207-214. <https://doi.org/10.1097/MLR.0000000000000944>

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Studies

- AORN- Oct 1999- Perioperative Care Coordinator Nurse Competency Statement
 - "providing leadership, clinical expertise and functional direction to other members of the HC team to achieve optimal patient outcomes."
- Oncology Issues- Oct 2011
 - "skilled communicator who provides holistic care, empowering patients with education and knowledge about their illness"
- Oncology Nursing Forum- March 2018
 - "ONN have the skills and knowledge to coordinate quality, patient-centered care through effective leadership of the interprofessional cancer care team"
- Journal of Nursing Management- Dec 2019
 - Nurse navigators innovatively integrate services and address the fragmented nature of the healthcare system
- Nursing Commons- June 2020
 - Periop Navigator assist in disseminating information to patient and family

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ANA- Position Statement 2021

- Care Coordination and Registered Nurses' Essential Role
 - "coordinate with members of patients' health care teams every day in the course of delivering health care services to patients, whether in acute care, long-term care, private practice, or other settings."
 - "supports the promotion and involvement of registered nurses in the development of future care coordination models"
 - "must be defined, measured, and reported to inform and ensure appropriate financial and systemic incentives for the professional care coordination role"
- ANA
 - "Function that helps ensure that the patient's needs and preferences are met over time with respect to health services and information sharing across people, function and sites."
 - Liaison between the patient and other care givers

<https://www.nursingworld.org/practice-policy/nursing-excellence/official-position-statements/ld/care-coordination-and-registered-nurses-essential-role/>

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Benefits- Nurse Navigator

- Increased patient satisfaction
 - communication
- Decreased patient anxiety
 - education and information
- Decreased length of stay
 - optimization
- Reduced treatment delay
 - access to exams, test and treatment

Esther Muscarì Desimini, Janine A. Kennedy, Meg F. Holsley, Karen Shiner, Chris Denton, Toni T. Rice, Barbara Stannard, Patrick W. Farrell, Peter A. Mammenstein & Margaret G. Lewis (2011) Making the Case for Nurse Navigators. *Oncology Issues*, 26(5), 26-33. DOI: 10.1093/OI/463356.2011.11883604

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Nurse Navigator Role - Oncology

- Educate patient about their disease and treatment plan
- Assess patients for psychosocial distress
- Support the timely scheduling of appointments, diagnostic testing, and procedures
- Empower patients, families, and caregivers to assume as much responsibility for care
- Function as a member of an interdisciplinary team
- Serve as liaison to the physician for additional questions and concerns

Anne Devine. (2017) The Nurse Navigator: A Patient's Compass On The Healthcare Journey, Nurse.org Staff.
<https://nurse.org/articles/nurse-navigator-career-path-salary-job-description/>

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Oncology Nursing Society

- Patient advocacy
- Problem solving
- Time management
- Critical thinking
- Multitasking
- Collaboration
- and Communication

Brown CG, Cantill C, McMullen L, et al. Oncology nurse navigator role delineation study: an Oncology Nursing Society report.
Clin J Oncol Nurs. 2012;16:581-585.

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Ambulatory Clinics

- Significance in the ambulatory setting (clinics)
 - improve patients' health outcomes and readmission rates for older people with at least one chronic condition
 - strategy to improve access to healthcare services
 - improve care management of patients with multiple chronic conditions
 - expand access to screenings and health services for vulnerable patients or population groups with chronic conditions who tend to underuse health services.

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Nurse Navigator – Hiring

- Providing education and support to the patient and family
- Identifying special needs of the patient and delegating to appropriate support staff
- Enhancing understanding of treatment options available
- Facilitating patient care plan recommendations by physician
- Connecting patient and family with community resources
- Coordinating multidisciplinary care from time of diagnosis throughout treatment
- Improving timeliness of appointments
- Serving as a resource for the community on health issues, prevention, screening, treatment, and research

<https://www.jons-online.com/issues/2016/july-2016-vol-7-no-6/1457-overview-of-professional-roles-and-responsibilities>

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Role Differentiation

- Patient Care Coordinator
- Nurse Coordinator
- Case Manager
 - May not be a nurse
 - Utilization of resources
 - Insurance and payment
 - Home care and supplies
 - Placement- rehab or nursing home
- Nurse Navigator

https://www.msnbc.org/sites/default/files/CCTM_vs_CM.pdf

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Will a Nurse Navigator Role assist in surgery preparedness in a preanesthesia clinic setting?

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PreAnesthesia Evaluation Clinic

- Goal: to assess the risks and develop the plan for anesthesia
- Elements
 - review the patient's medical history, including anesthesia, drug, and allergy history
 - assess anesthesia risk and identifying potential anesthesia problems
 - collect additional pre-anesthesia data or information
 - discussing risks and benefits and obtaining informed consent
 - developing a plan for the patient's anesthesia care as described in ASA's Basic Standards for Pre-Anesthesia Care
- necessary to optimize underlying medical conditions, perform care coordination, and/or develop medical optimization transition or bridging orders for patient safety and optimal outcomes

<https://www.asaha.org/quality-and-practice-management/managing-your-practice/timely-topics-in-payment-and-practice-management/distinguishing-between-a-pre-anesthesia-evaluation-and-a-separately-reportable-evaluation-and-management-service>

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UCHealth Preprocedure Services (PPS) Clinic

- Director of Preprocedure Services
- RN Manager and RN Charge
- Clinic
 - Attending Anesthesiologists
 - Anesthesia Residents and Intern
 - Advance Practice Providers- Nurse Practitioners
 - Case Reviewer- Nurse Navigator
 - Medical Assistants
 - Schedulers
- In person Evaluation and Telehealth
- RN Call Center
 - Nurses

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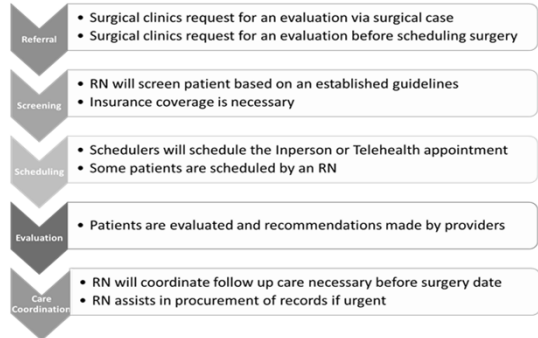
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Preprocedure Services Clinic- Flow



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PreAnesthesia Navigator Role

- Assess patients' risk for perioperative adverse outcomes
 - Guidelines and protocols
 - Assist in scheduling patient pre-anesthesia/surgery evaluation
- Coordinate care needed after preanesthesia visit
 - PCP, Specialty consults, testing, follow up
- Collaborates with members of surgical and multi disciplinary teams in assisting and planning of perioperative course
 - Point of contact for surgical clinics and PreOp/PACU
- Educate patient about perioperative processes- NPO, SSI

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PreAnesthesia Navigator Role- Qualities

- Clinical background: Perioperative and Perianesthesia or Med Surg,
- Patient advocate- diverse population group
- Communication skills
 - Patient and Families
 - Healthcare Team
 - Customer service
- Electronic health record and computer charting
- Organization and multitasking
- Innovative
 - Outside the Box

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Screening

- Guidelines, Protocols and Processes
- Surgery Magnitude
 - Extensive- length of surgery
 - Invasive
 - Blood Loss
 - ERAS
- Type of Anesthesia
 - General
 - Regional
 - MAC
 - Local

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Screening- Chronic Med Conditions

- Cardiac-
 - CAD, MI, recent stent, Valve dse,
- Vascular-
 - Stroke, VTE, anticoagulants
- Pulmonary-
 - Airway, COPD, ILD,
- Neurologic-
 - Seizures, Parkinsons
- Gastrointestinal-
 - GERD, dysphagia,

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Screening- Chronic Med Conditions

- Hepatic
 - Cirrhosis, hepatitis,
- Renal-
 - Kidney function, dialysis, labs
- Endocrine-
 - Diabetes, Thyroid, Adrenal
- Musculoskeletal-
 - Chest wall, spine
- Hematologic-
 - Anemia, Hemophilia, Protein S, Factor V Leiden

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Screening- Chronic Med Conditions

- Autoimmune-
 - immunosuppressive meds, Transplant
- Nutrition: BMI
- Frailty score- age, mobility
- Social concerns
 - smoker, drugs and ETOH, Opioid antagonist, support, emotional state
- Infection- MRSA, COVID
- Other
 - Allergies
 - Undiagnosed
 - Polypharmacy

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Screening- Other

- Laboratory results
- Diagnostic Tests- CT, U/S, Echo
- Does the patient have a Primary Care provider?
- Does the patient see his PCP on a regular basis?
- Does the patient see a specialist or have been evaluated
 - Cardiology, Pulmonology, Endocrinology, Nephrology, etc
- Recent ED visit or Inpatient admissions
- Recent surgery

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Assessment- Screening- Current disease state

- What is the reason for surgery?
- Where is the location of the diseased state?
- Will it affect major organs?
- Will it exacerbate chronic medical conditions?
- Is it urgent?

Emergent <24 hr	High Urgency Within 1 wk	Moderate urgency Within 4 wks	Non-urgent Within 1-6 months
Without procedure patient is at high risk of cardiovascular mortality	Without procedure patient will suffer major cardiovascular morbidity or death	Without procedure patient will have persistent symptoms with potential progression to increased risk of major morbidity or death	No physical consequences of delaying procedure, may have exacerbation of benign symptoms
Tier 0	Tier 1	Tier 2	Tier 3

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Care Coordination

- Coordinate follow up care needed by preanesthesia provider
 - Assist in scheduling PCP appts manage chronic state
 - Referral to specialty clinic: cardiology, pulmonary, neurology, hepatology, hematology, etc
 - Follow up visit notes and anticipate further testing
 - o Cardiac dx, pulmonary, radiology
- Procure medical records as needed
- Alerting Preop dept
 - Cardiac Device, Preop Infusions, MH Alert, Fetal Monitoring, other

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Other

- Support for preprocedure clinic staff
 - Schedulers, Medical Assistant, Record Retrievers, PAT RN
- Support for surgical clinics- questions
- Assist with patients preop instructions
- Covid Orders and instructions
- Research and PI projects
 - Anemia management
 - Spine processes
 - Penicillin allergy testing

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Patient and Staff Satisfaction- Examples

- Patient missed her appt- referred to social worker
- Covid testing- assist patient in registering to get a QR code
- System Outage- sent patient to bring EKG and letter to Cardiologist
- Specialty pharmacy in Florida
- CHF- PCP not reachable-COVID outbreak in facility- dispatch was sent
- No openings at UCHealth- find the patient an outside Endocrinologist
- Cheyenne testing is limited and difficult to schedule- Poudre Valley
- Schedule a young person to get ECHO in Kansas
- ECHO- abnormal- Cardiathoracic Referral- Aortic Stenosis- Cardiac Surgery

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Barriers and Challenges

- Lack of information on patients' health record
 - Unable to conclude status during screening
 - PAT RN call supplements the health information
- Clinic staffing problems – schedulers and medical assistants, providers out
- Patient related factors
 - Transportation
 - Financial
 - Support
 - Disabilities
 - Lack of knowledge
- Other
 - Time- surgery date too close
 - PCP or Specialty Clinics not able to accommodate
 - Testing not available
 - Unable to reach
 - Non- compliant

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Overcoming Challenges

- Identified key staff in various clinics to assist in scheduling tests
- Worked with practice manager for Cardiology clinic to escalate scheduling than cancelling surgery
- Create a directory of healthcare facilities in Colorado and surrounding states for patient to get their follow up tests
- Create a systematic report to keep track on what patient needs to do for surgery preparedness
- Cross train clinic staff (MAs) to do scheduling
- Cross train PAT RNs to cover Case Reviewer/Navigator role
- Technology- use the "quick chat" feature within the EHR when communicating to be resolve issues and concerns

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Summary

- Preanesthesia Nurse Navigator performs an integral role on the perioperative process
- Assess patients risk for perioperative adverse outcomes
- Care coordination in optimizing patients before their surgery
- Acts as patient support and ensures surgery preparedness
- Resource for pre-anesthesia evaluation clinic and surgical clinics

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Questions

1. Which one is not a patient barrier in attaining cancer treatment _____
 - a. Financial
 - b. Medical
 - c. Communication
 - d. Pet Therapy
2. Organization and ability to multitask are important quality to perform the role of nurse navigator
 - a. True
 - b. False
3. All are important benefits of a nurse navigator in ambulatory setting except
 - a. Increased patient satisfaction
 - b. Decreased patient anxiety
 - c. Reduced treatment delay
 - d. Replaced caregiver

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“
You have brains in your head. You have feet in your shoes. You can steer yourself in any direction you choose.

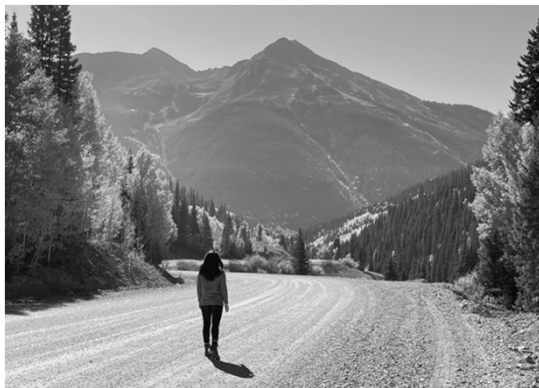
Dr. Seuss

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Thank you and see you on Colorado, 2023!

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