



# Care Navigation

Training For Frontline Staff

Updated January 2020

# Care Navigation: The 'Wakefield' way

Improve access to primary care and reduce GP pressures  
through better signposting

**Today's healthcare systems are complex. Patients often present with complex needs that are difficult to address within a short appointment, particularly within primary care. More often than not, we also know that these needs require a number of professionals to work together to deliver the best possible outcomes.**

It's easy to see why this can prove challenging for patients to know where best to go for help and advice to meet their health and wellbeing needs.

Care navigation is a tried and tested model of care that improves access to primary care services for patients and reduces GP pressures all in one.

It allows frontline staff to provide patients with more information about local health and wellbeing services, both within and outside of primary care, in a safe, effective way. Care navigation offers the patient 'choice not triage' to access the most appropriate service first which as we know, isn't always the GP.

We define care navigation as:

*"A person-centred approach that uses signposting and information to help primary care patients and their carers move through the health and social care system, as smoothly as possible, to ensure that unmet needs are met".*

So for example when a patient presents with symptoms that meet the access criteria for other services such as a physiotherapist, pharmacist, optician or third sector service, the care navigator can confidently offer these choices and enable the patient to go straight to the service which best meets their health and wellbeing needs. This saves GP time but more importantly, improves access and experience for patients.

## **History of the 'Wakefield way'**

In 2016, a GP federation in West Yorkshire, successfully developed a safe, sustainable and scalable care navigation model that has since gone nationwide.

Developed within general practice, for general practice, this multi-award winning care model has won praise from health leaders and frontline staff alike.

Today, Wakefield's care navigation consultancy and training programme is delivered by Wakefield's GP Confederation, Conexus Healthcare.

28% of practices in England and 27% of practices in Wales have care navigators who have been trained by us.

**Read on to discover how your CCG area could benefit from training and support with the UK's leading care navigation training provider.**

# Replicating Success

The UK's first multi-award winning Certificate in Care Navigation training programme for frontline staff

**Here at Conexus, we believe we have developed a care navigation approach that can be replicated throughout the health system and meet the aspirations outlined in NHS England's GP Forward View (2016) and echoed in the latest NHS Long Term Plan (2019).**

We are proud to deliver the country's first fully endorsed Certificate in Care Navigation training programme for frontline staff which has been adopted by over 60 CCG areas so far and counting.

As both an accredited learning centre and provider, we believe our programme is unique amongst similar products.

Our training covers not just the concept of active signposting, or care navigation as we like to call it, but the practical, step-by-step approach you'll need to take to implement care navigation safely and successfully in your area.

And if you already have care navigation in place, we offer a range of products to help you take that model to the next level. From business intelligence and developing practice champions training, to navigating to social prescribers and essential soft skills workshops, our extra support can truly benefit your care navigators, new primary care networks and patients alike.

**The following pages contain feedback from some of our latest care navigation sessions and 'next steps' training.**



## **Delivering results nationwide**

Delivered in over 67 CCG areas so far and counting.



## **Tried and tested by thousands**

Over 11,000 learners have successfully completed the online course.



## **Approved by receptionists**

97% of participants overwhelmingly agree they understand how to navigate someone after the training. We've collected feedback from over 9,000 learners!

### **South Tees**

12,127 signposts and estimated 1,270 GP hours saved in four months

### **Bassetlaw**

Estimated 324 GP hours saved in three months

### **North Staffordshire**

11,261 signposts and estimated 1,843 GP hours saved in six months

### **Hereford**

11,001 signposts in Hereford within four months

# Workshop and Training Experiences

## Quotes from participants



**"I often feel these things are a waste of time, however this will really work. However, we must ensure we put in the leg work as it will only be as good as the time we put into it. David was very good. Roll on the 8th March."**

"Very informative and I am delighted to be part of a service re-design making it more practical in GP practice."

**"Personally, I think Care Navigation should be used everywhere to help empower patients to make choices about their own care. The course itself was clear and informative, with all questions being answered by all staff members. One of the admin team said it had brought all the staff together. She said it gave her job satisfaction and would not like to go back to the old way of doing things, and that patients were happier since the Care Navigation options started."**

"This is an excellent opportunity for practices to share best practice and to open the door for networking and collaborative work."

**"The practice visit helped us to visualise how our own practice can put Care Navigation into operation without putting in major changes for the patients. We can now see that this could be a seamless transition to this new procedure."**

"This is definitely the way forward and hopefully will have a positive impact on GP services. The main thing now is taking this forward."

**"I just wanted to say how excellent the trainer was. We had numerous attendees saying that they could relate to her because they felt she understood what they do and the difficulties"**

"I would be more than happy to get on board with this and be a practice champion for this service!"

**We are now using the minor eye conditions service in practice and have used this today! We redirected a patient and saved an urgent appointment."**

"Care navigation, once established, will be great in enabling patients to get the care that they need as quickly as possible. As long as Care Navigators are given the right information in order to navigate patients to the most appropriate service, it will be very useful within a GP practice."

**"A very interesting insight into care navigation. Having recently returned to the NHS after several years I found this course extremely helpful. Thank you."**

"It was a really good session - great organisation and was very engaging. Felt really positive to see how much progress is being made... Thank you!"

**"After completing the online learning and passing the test, I feel I am now fully aware of what care navigation is and what it will mean to both the patients and the surgery. I am now excited to start care navigating and providing the best possible service to all of our patients, directing them to the best possible choice."**



# Workshop and Training Experiences

## Quotes from participants



"I picked up a lot of useful tips that can be used on a daily basis in my role as a receptionist."

Communication Skills Workshop

"One of the most informative and enjoyable training sessions I have had in a long time"

Assertiveness Skills Workshop

"Some e-learning can be very boring and uninteresting but I found this interesting and easy to follow"

Care Navigation Workshop

"We couldn't have dreamt it would have been taken on board as positively by so many as it has been!"

Care Navigation Workshop

"Enjoyed this afternoon. An informative course. Will make me think about what words to use when doing my job."

Assertiveness Skills Workshop

"I enjoyed the session, found great ways to develop in my new position"

Assertiveness Skills Workshop

"The chance to discuss experiences and find out what other surgeries think about the problems."

Communication Skills Workshop

"This training needs to be offered to all new reception staff. Extremely informative, very helpful. I left feeling that we do an important job well."

Conflict Resolution Skills Workshop

### ...Winning recognition nationwide as well

Winners of 'Training Provider of the Year' at the General Practice Awards 2018

Winners of 'Community or Primary Care Services Redesign (North/Midlands/East)' at HSJ Awards 2018

Winners of 'Improving the value of primary care services' at HSJ Value Awards 2018

Winners of 'Best Example of Adoption & Diffusion' at Yorkshire & Humber Academic Health Science Network 2018

Winners of 'General Practice Forward View Innovations - Developing the Practice Team' at the GP Awards 2017

# Training in Focus

There are two elements to the main care navigation training programme that Conexus offers

## Part One – Consultancy

The first element is for system leaders (CCGs and practice managers etc) and this includes mapping the existing local services and access pathways, exploring local directories of service and supporting the development of system templates. It also explores marketing and business intelligence.

The consultancy is an essential step to ensure the local infrastructure is in place and clinically signed off before care navigators start their front line work. Consultancy is available online via our Virtual Learning Environment or face-to-face.

## Part Two – Introduction to Care Navigation

The second part of the package is accredited online training for frontline staff such as receptionists, administration staff and practice managers.

Each module is fully-interactive and can be accessed on multiple platforms which means staff can access care navigation training wherever they are, on whatever device they choose i.e. smartphone, tablet.

Each aspect of the training is designed to fully engage the learner and help them understand the role, what good care navigation looks like and how to undertake it.

At the end of the training, there is an assessment for learners designed to be achievable if they have grasped the basics, with a limit of three attempts.

## Additional training

Once you have care navigation implemented, we offer Next Steps modules that can develop and enhance your model even further. Learn more over the page.



# Next Steps Modules

Build on existing care navigation training with 'top up' practical skills training. Small interactive group sessions that will boost your care navigators confidence.

## **Assertiveness and Influencing Skills for Care Navigators**

By attending this workshop, your care navigators will be able to demonstrate the following learning outcomes:

- an increased understanding of 'soft skills' as a skill set that they can develop and employ in their day-to-day work with patients.
- be able to recognise how they can become more assertive and understand how to continue to develop their confidence by being more assertive.
- demonstrate increased confidence in working with patients by understanding the use of influencing and negotiation skills.
- feel more empowered and equipped to deal with competing demands that practice staff face daily.

## **Conflict Resolution Skills for Care Navigators**

By attending this workshop, your care navigators will be able to demonstrate the following learning outcomes:

- an enhanced understanding of the needs of the patient, through their increased understanding of the use of soft skills - subsequently reducing the potential for conflict in with the patient.
- demonstrate that they understand, and know how and when to apply, the principles of conflict resolution.
- feel more equipped and confident in using solution-focused approaches to respond to patient need.
- be able to use negotiation skills to reduce conflicting situations, with a greater understanding of how this can be used to improve working with patients.

## **Communication Skills for Care Navigators**

By attending this workshop, your care navigators will be able to demonstrate the following learning outcomes:

- an increased understanding of 'soft skills' as a skill set that they can develop and employ in communicating and listening to patients.
- understand the importance of self-awareness in dealing with complex situations, with a focus on non-verbal communication.
- be able to demonstrate that communication skills can be used in a variety of patient-based scenarios.
- develop a greater understanding of adjusting responses to patients according to their needs.

## **Personal Resilience Skills for Care Navigators**

By attending this workshop, your care navigators will be able to demonstrate the following learning outcomes:

- understand what personal resilience is, and how it can be strengthened and developed.
- feel more confident in dealing with difficult patients, with tips and techniques like de-escalation techniques.
- be able to develop coping strategies for complex situations – bouncing back when things go wrong!
- learn how to manage stress and pressure in a healthy way.
- learn about the benefits of relationship building in the workplace and how this helps with personal effectiveness and resilience.
- feel more empowered and equipped to cope with the competing demands that practice staff face daily.

## **Make the most of your Social Prescribing Link Worker**

By attending this workshop, your care navigators will be able to demonstrate the following learning outcomes:

- a full understanding of social prescribing within general practice.
- be able to care navigate to social prescribing.
- explore methods of engaging and supporting patients to choose social prescribing.
- connect and network with fellow practice colleagues within the new primary care networks.

## **Digital Customer Service Skills**

By attending this workshop, your care navigators will be able to demonstrate the following learning outcomes:

- develop the unique skills needed to provide excellent customer service on social media and online.
- be able to handle any digital customer with a proven digital customer service technique.
- confidently write and engage with patients (and trolls) on social media without the fear of 'getting it wrong.'
- feel more equipped and confident at staying safe online and improving online reputation.

## **Care Navigation Practice Visits**

Onsite sessions with practice staff which can be tailored to suit the needs of the practice:

- review how care navigation implementation is going.
- share good practice.
- identify any barriers to implementing care navigation.
- problem solving and mentoring with the practice team.



# Packages

There are three different levels of support (see below) as well as top-up and practice-only support (see over the page). The licences refer to the online training for frontline staff (one learner per licence).

	Silver £11,000	Gold £18,000	Platinum £30,000 MOST POPULAR	Bespoke Please enquire for quote
			Recommended for large scale or CCG-wide implementation	Price based on selected elements
Licences for online training	100	150	250	<p>A package tailored to your organisation's needs based on elements from other packages.</p> <p>You also have the option to add in Next Steps Modules.</p> <p><b>Don't need a full package? Ask us about our Introduction to Care Navigation introductory workshop.</b></p>
Management module licences	20	30	50	
Onsite workshops	4	8	12	
Business Intelligence support	✗	✗	✓	
Consultancy support to help you implement locally	✓	✓	✓	
Dedicated lead consultant	✓	✓	✓	
A bespoke project plan & access to resources	✓	✓	✓	
Live webinars & check-ins throughout project	✓	✓	✓	
Support & advice for local project lead	✓	✓	✓	
Access to our team of care navigation experts	✓	✓	✓	
Access to best practice examples	✓	✓	✓	
Workshop evaluations	✓	✓	✓	

## Additional information

We recommend training 1 learner per 1000 patients, so for an area with +250,000 patients, we recommend training 250 learners. The packages and licences are purchased as **one package via purchase order**.

**Prices are exclusive of VAT and travel and venue expenses.**

Benefit from face-to-face support as standard across all our packages including your face-to-face sessions with local service providers. We support you to identify these providers in workshop one.

Health Education England\* recommends face to face support to mentor learners so we are proud to offer this unique benefit. \*Care Navigation Competency Framework 2016.

**If you are considering our Next Steps modules only, please contact us for a quote and further information.**

## Top-up & Practice-only Packages

	<b>Annual Maintenance Package</b> <b>£1,500</b> excl VAT	<b>Non-accredited Single Practice Package</b> <b>£3,000</b> excl VAT incl all expenses
	<b>Follow up Post Full Care Navigation implementation</b>	
Licences for introductory module for new starters	10	✗
Management module licences or retain access to previous ones	✓	2
Access to offsite consultancy	2 x 1-hr support calls per year	✗
Expert implementation support	✗	✓
Onsite workshops	✗	2
Annual top tips & new resources e-bulletin	✓	✓

## Ready to adopt care navigation & transform your organisation?

Contact our team at [carenavigation@conexus-healthcare.org](mailto:carenavigation@conexus-healthcare.org)  
to express your interest and discuss next steps.

Conexus Healthcare is the GP confederation (groups of GP practices) for all practices in the Wakefield District and proud providers of the UK's leading care navigation training programme.

[www.conexus-healthcare.org](http://www.conexus-healthcare.org)

