

TECHNOLOGY WITH PURPOSE:

How Navigators Can Lead
Ethically, Strategically, and
Equitably



**Concurrent Session –
Farragut**

Disclosures



I do not have any financial or any other disclosures to make relevant to this presentation or work in the patient navigation space.

Our Panel



**Moderator - Linda Fleisher, PhD, MPH, Research Professor,
Fox Chase Cancer Center, Vice-Chair, ACS NNRT**

- 1 Pia Banerjee, PhD, Director, Cancer Innovation & Transformation, American Cancer Society**
- 2 Linnea Vanpelt, RN BSN, OCN, Manager, Cancer Support Services, The N.C. Basnight Cancer Hospital and Lineberger Comprehensive Cancer Center**
- 3 Christina Bach, MBE, MSW, LCSW, OSW-C, FAOSW, Psychosocial Content Editor, Oncolink**

Setting the Stage



**ELECTRONIC HEALTH
RECORDS**

PATIENT PORTALS

HEALTH APPLICATIONS

TELEMEDICINE

**AI-ASSISTED CARE
COORDINATION**

PLATFORMS

CHATBOTS

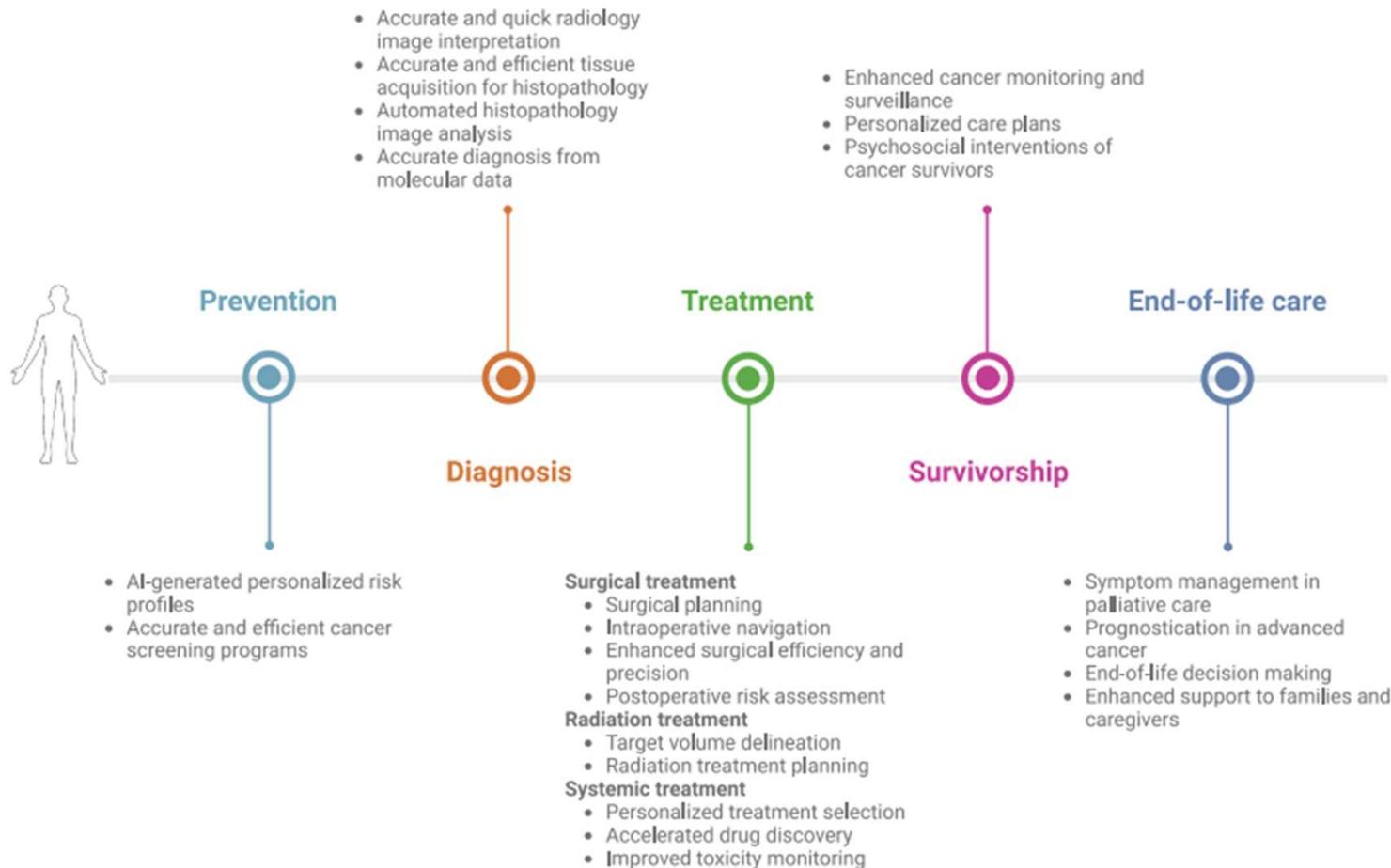


FIGURE 1 Application of artificial intelligence throughout the cancer continuum. Application of artificial intelligence in prevention, diagnosis, treatment, survivorship, and end-of-life care for patients with cancer. AI indicates artificial intelligence. Created in BioRender (Khan, M. [2025]; <https://BioRender.com/wg1gqgf>).

ENHANCING PATIENT NAVIGATION WITH TECHNOLOGY TO IMPROVE EQUITY IN CANCER CARE

PRESIDENT'S CANCER PANEL

PRIORITY AREAS TO PROMOTE EFFECTIVE USE OF TECHNOLOGY FOR CANCER PATIENT NAVIGATION:

- ★ Use technology to support patient navigation and enhance equity
- ★ Ensure equitable access to technology
- ★ Promote responsible development and use of technology
- ★ Facilitate data sharing while maintaining privacy and security



November 2024-<https://prescancerpanel.cancer.gov/reports-meetings/enhancing-patient-navigation-2024>

Use Technology for Equitable Outcomes

Facilitate efficient patient-centered coordination of care

Help navigators connect patients with org and local resources

Provide vetted, personalized cancer – related information for patients and caregivers

Ensure Equitable Access

Provide sustainable funding for federal programs that facilitate access to broadband

Increase patient access to devices and private space through community sites to facilitate access to telehealth appts

Promote Responsible Development and Use

Adhere core principles for responsible development and use

Support research to ensure technology supports navigation goals

Incorporate technology knowledge and skills into patient navigator training and core competencies

Maintain Privacy and Security

Improve and incentivize of portability of patient data across platforms and systems

Evaluate existing privacy and security regs/laws & identify opportunities for national legal framework to protect patients

Recommendations

Technology should augment, not replace, people

Technology must be responsibly developed and used.

Technology should help achieve equity, not exacerbate disparities.

Where to Start? What's the Guidance?



Across the Field

- Review the growing literature
- Use the President's Cancer Panel Report
- Talk to colleagues – learn from their experience
- Keep your eye on the commercial side

Your own Institution

- Find your IT allies
- Assess the resources and support – find funding
- Keep educating leadership about what is happening in the field to keep up
- Seek training opportunities

Patients & Community

- How are they using technology – what are the opportunities and challenges?
- Is this technology useful/valuable to them?
- How to support them using technology?

Putting Evidence into Action: Practical Insights for Technology Use in Navigation

Pia Banerjee, PhD
Director, Cancer Innovation & Transformation



September 18, 2025

Disclosures



I have no relevant disclosures.

Four Key Learnings

BUILDING THE FOUNDATION

Today's Goal: Equip navigation leaders with actionable learnings to evaluate and implement technology for navigation, grounded in 4 key learnings.

SUCCESSFUL TECHNOLOGY FOR NAVIGATION SHOULD BE...



Human-Centered



Impactful



Adoptable



Sustainable



Human-Centered Technology

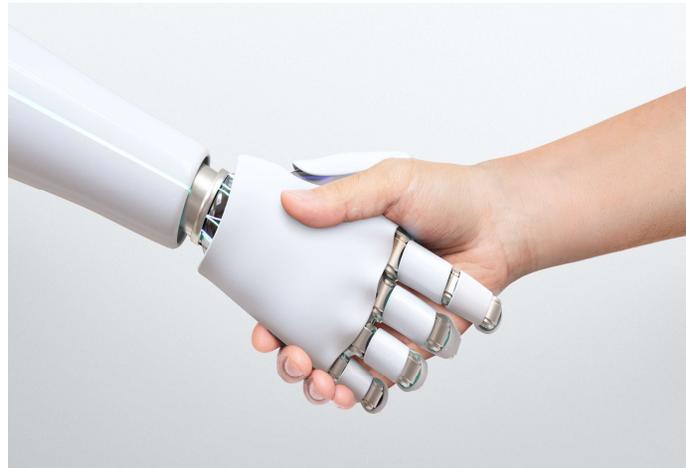
Human-centered design understands and prioritizes the needs, behaviors, and experiences of all people involved, including patients (patient-centered), caregivers, and providers

TECHNOLOGY EMPOWERS, BUT DOESN'T REPLACE, HUMANS

Human Augmentation

Technology

- Automates routine tasks
- Streamlines communication
- Expands reach to underserved
- Supports AI-informed triage
- Connects patients to resources
- Tracks progress and outcomes



Human

- Provides emotional support
- Builds patient trust
- Advocates for patient needs
- Guides complex decision-making
- Addresses systemic barriers



Human-Centered Technology



ACTS

ACS ACTS: Clinical trials matching program + wraparound navigation

- Addresses barriers to clinical trial enrollment and participation
- In first 6 months: provided clinical trials education 500+ individuals; assessed over 1,300 health related social needs



CARES

ACS CARES: App for patients and caregivers

- Offers curated resources and social support from trained community volunteers

TECHNOLOGY TARGETED TO USER NEEDS + INTEGRATED WITH HUMAN EXPERTISE

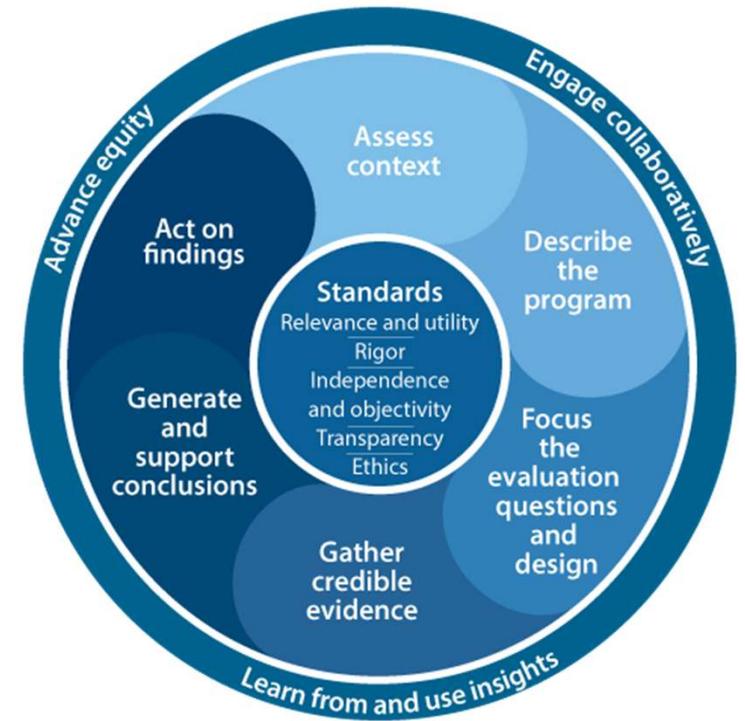


Impactful Technology



Technology is impactful when it produces measurable results that matter for the program, patients, and organization.

- **Measurement:** Track process and outcome measures with key benefits:
 - **Demonstrate Value:** Show program effectiveness
 - **Support Decision-Making:** Provide evidence to guide scaling, funding, or adoption of the program or of the navigator function
 - **Continuous Improvement:** Data informs refinements to maximize impact



CDC Program Evaluation Framework, 2024



USE DATA TO PROVE VALUE, GUIDE DECISIONS, & DRIVE IMPROVEMENT



Adoptable Technology

Adoptable technology is designed for real-world use, with planning on how it can be implemented.

- **Workflow Fit:** Integrates seamlessly into navigators' daily tasks and routines
- **Simplicity:** Minimizes friction; avoids tool fatigue
- **Human:** Actively involves navigators who become champions
- **Clarity:** Makes value obvious and ideally immediate



WHEN TECH ALIGNS, ADOPTION FLOWS NATURALLY



Sustainable Technology

Sustainable technology requires multi-dimensional support to remain effective, supported, and adaptable for the long-term:

- **Organizational:** Aligned with organizational priorities with leadership buy-in
- **Operational:** Fits smoothly into workflows; minimal extra burden
- **Human:** Trusted and consistently used by navigators; champions provide ongoing support
- **Financial:** Sustained through stable funding, e.g., long-term grants, fundraising, reimbursement
- **Programmatic Impact:** Continuously delivers meaningful outcomes and adapts to feedback

SUSTAINABLE TECHNOLOGY DEPENDS ON PEOPLE, PERFORMANCE, AND PURPOSE

Questions to Assess Navigation Technologies



1

Does this technology address the real needs of patients and navigators?



2

What measurable results will this technology produce for the program, patients, and organization?



3

How do you make your technology invisible / seamless into workflows or systems?



4

What champions and support structures will be in place to drive adoption?



5

Does the technology fit within your organization's strategic priorities?



6

Is the technology viable over time? Can it sustain low periods?

Key Takeaways: Four Pillars

SUCCESSFUL TECHNOLOGY FOR NAVIGATION SHOULD BE...



Human-Centered



Impactful



Adoptable



Sustainable

Pearls of Implementation: The 5 B's

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UNC Health Cancer Navigation Program

Oncology Education Program

UNC Health Cancer



Disclosures....and the Story of a Pearl

No disclosures to declare.

Pearls:

- Biological process
- Response to injury or irritation
- Designed as a protection
- Layers of 'Mother of Pearl' (calcium and protein)
- Given time, becomes something beautiful



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The 5 B's: Balance, Buy in, Backing, Breathing and the (new) Bottom Line

Turning irritants into iridescence:

1. **Bull's eye** becomes **Balance**
2. **Bullying** becomes **Buy in**
3. **Bucking** becomes **Backing**
4. **Burnout** becomes **Breathing**
5. **Business** becomes **Bottom Line**

Balance starts with small steps

Progress > Perfection

- Small steps can (and have to) happen before you are 'fully resourced'
- Building standard work from the 'get go' goes a long way
- Test, trial, tweak, repeat (PDSA)

Common sense > Consensus

- If you ask for everyone's opinion, chances are you'll get it, so be intentional with the ask
- If it is common sense, sometimes it's okay to 'just do it' and evaluate the response



Buy-in requires belief



Bullying, browbeating, blindsiding teams into changing their practice can result in:

- Inconsistent or insufficient practices
- Inaccurate data
- Resentment of additional ‘burden’
- Loss of identity, meaning and investment in daily work

Why is the ‘why’ so important?

- Connection to core beliefs
- Openness to two-way changes
- Tools & workflows are only useful to the extent that they are *actually used*
- The most important piece of the puzzle is the one that touches the patient



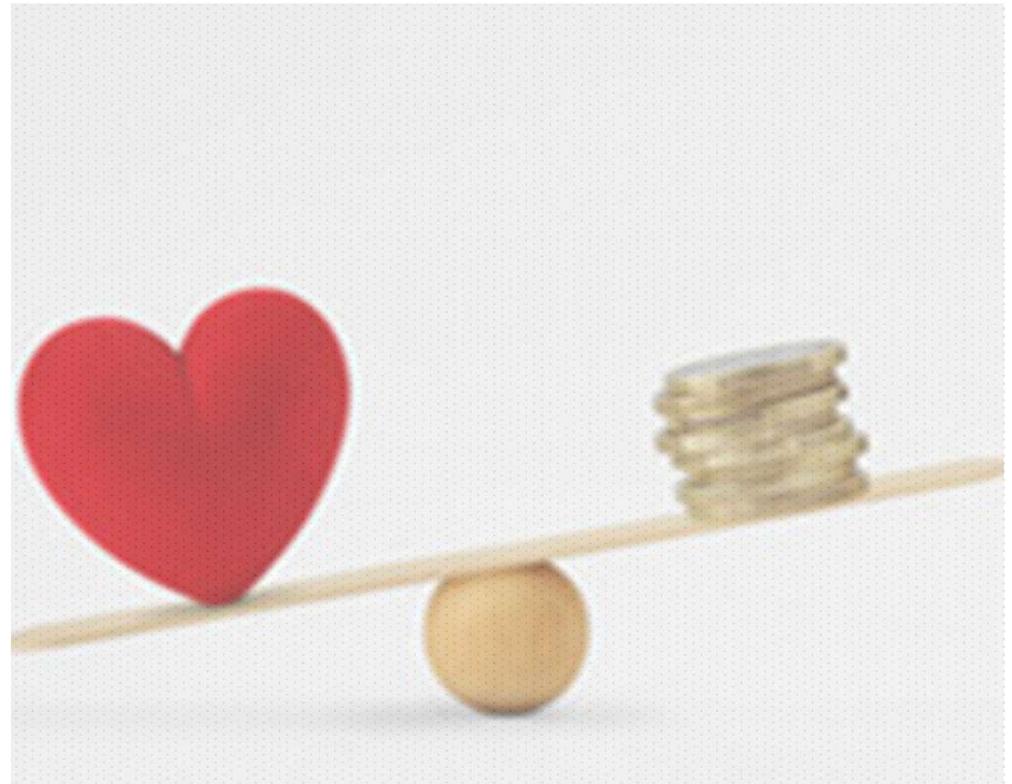
Backing: Believe that the C-Suite Cares

Important:

- Return on investment
- Resource allocation
- Numbers

Essential:

- Connection to core values
- Resource retention
- Narrative



Sometimes, you need to back away (and breathe)

Reality:

- This work is hard, complex, messy, expensive and never done

Respond to reality with resilience:

- Taking a breath is not giving up
- Reframing or retiming your scope and success is not failure
- Making and molding relationships is more valuable than martyrdom
- Money is not the object, but it is often the means



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In this business, people are the **bottom line**

No one *wants* to be the customer in the ‘business’ of cancer care, and ‘profit’ is measure in people served, not payoff

- Standards of care should be studied, set, shared and *supported* in all cancer care settings based on patient care outcomes, not only financial ROI
- Local adaptations of standards of care can be effective, as long as they are efficient and equitable. Balancing this across different settings and operations is challenging!
- Good ideas come from everywhere and should flow in all directions



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Thank you

BALANCING INNOVATION AND INTEGRITY: ETHICS IN PATIENT NAVIGATION



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Psychosocial Content Editor, OncoLink/Penn Medicine
Financial Navigation Specialist, Cancer Support Community



DISCLOSURES

I have no financial relationships to disclose.

Technology is transforming cancer care and cancer navigation.

- EMRs, patient portals, telehealth, AI, chatbots, decision-support tools, social media.

These tools help improve efficiency, access, and scalability.

- They also raise new ethical challenges.

Navigators are at the intersection of the patient experience, clinical care delivery and larger organizational and external systems.

- Thus, we are uniquely positioned to identify opportunities and risks with an ethical lens.

WHY DO ETHICS MATTER?

APPLYING ETHICS TO PATIENT NAVIGATION

Patient Autonomy

Benevolence and Non-Malevolence

Access and Equity

Justice

Privacy and Confidentiality

Informed Consent

Advocacy

Quality Improvement

Professional Boundaries and Workload

NAVIGATOR ROLES

Advocate

Educator

Watchdog

Collaborator

Protector

Boundary Keeper

Bridge Builder

Knowledge Seeker

Leader

How do we do this ethically in
a digital/technological space?



HIGHLIGHTING NEEDS OF SPECIAL POPULATIONS WHEN USING TECHNOLOGY IN NAVIGATION

Older adults

Rural and remote
populations

Individuals with low
health literacy

Individuals with
limited English
proficiency

Marginalized,
disenfranchised,
socioeconomically
disadvantaged
individuals

Individuals with
disabilities

Survivors of trauma

KEY QUESTIONS FOR NAVIGATORS

Am I respecting the patient's values, culture, and autonomy?

How might systemic barriers (transportation, cost, discrimination) affect this patient's access to care?

What assumptions am I making about this patient?

How do I protect confidentiality while coordinating across multiple systems?

Am I staying within my professional scope while advocating ?

Who is at risk for being left out or left behind?

Is consent ever really informed?

Is data secure?

Does the use of technology support our work, not replace it?

KEY QUESTIONS FOR NAVIGATORS

KEY TAKEAWAYS

Ethics are the foundation of trust, fairness, and professionalism in patient navigation.

Navigators play multiple roles that should be grounded in ethical principles.

Applying ethics means balancing patient autonomy, confidentiality, and justice while working within complex systems.

Special populations (older adults, rural residents, low literacy, limited English, marginalized communities, trauma survivors) require extra attention to equity and access.

At the heart of ethical navigation is the commitment to dignity, respect, and empowering patients.



QUESTIONS



Thank you!