Worksheet Session 3 Workflow Integration

PNSAT Reflection + Sustainability Action Planning Prep

Instructions
Use your PNSAT results and today's session to reflect on how well navigation is integrated into your clinical workflows. Complete this soon after the session and revisit it as your thinking evolves.

Reminder
The information from the PNSAT and your worksheets are for your use. The specifics will not be shared widely. We will not include names of centers with results in any presentation, report or paper.

That being said, the results are important to your work. You'll use this worksheet in **Session 6 to build your action plan**. Completing it soon-and revisiting it over time will make that process much more concrete and actionable.

Part 1: Where Are You Now?

1. Self-Identification

Based on your PNSAT results, where is your program in workflow integration?

- ☐ **Building** (workflows are informal or inconsistent)
- ☐ **Strengthening** (workflows exist but vary across staff/sites)
- ☐ **Optimizing** (workflows are standardized, integrated, and continuously improved)

2. What's Working Well? (Strengths)

Identify 2–3 strengths in how navigation workflows are integrated into your program.

- Strength 1:
- Strength 2:
- Strength 3 (optional):

3. Where Are the Gaps? (Opportunities)

Identify 2–3 workflow integration challenges.

- Gap 1:
- Gap 2:
- Gap 3 (optional):

4. Real-World Example
Describe one example that reflects your current workflow integration.
(e.g., referral process, navigator handoffs, documentation challenges, missed follow-up)

Part 2: Digging Deeper (Aligned to PNSAT + EBPP)

A. Workflow Definition & Standardization

- Are navigation workflows clearly defined and documented?
- Do staff follow the same process, or does it vary?

One improvement idea (EBPP: SOPs, standard workflows):

B. Referral & Intake Processes

- How do patients enter navigation?
- Are referral pathways clear, consistent, and reliable?
- Do referrals get completed ("closed loop")?

One improvement idea (EBPP: clear referral pathways, tracking):

C. Integration with Clinical Teams

- How are navigators integrated into care teams (e.g., clinics, tumor boards)?
- Are roles and expectations clear to providers and staff?

One improvement idea (EBPP: team-based integration):

D. Workflow Across the Care Continuum

- Do workflows support patients across:
  - ☐ Screening
  - ☐ Diagnosis
  - ☐ Treatment
  - ☐ Survivorship

Where do transitions break down?

One improvement idea (EBPP: coordinated care transitions):

E. Integration with Community Resources

- Are community referrals (e.g., transportation, financial support) built into workflows?

- Are partnerships formalized or informal?

One improvement idea (EBPP: formal partnerships):

F. Workflow Monitoring & Improvement

- Do you track workflow performance (e.g., referrals, follow-up, timeliness)?

- How do you identify and fix workflow issues?

One improvement idea (EBPP: QI, PDSA, data use):

Part 3: Connecting to Sustainability

How does workflow integration support (or limit) your program's sustainability?

- Where does your program rely on individuals instead of systems?

- Where are workflows strong enough to support growth or expansion?

Part 4: Your First Action Step (Prep for Session 6)

Identify ONE realistic workflow improvement to test in the next 30–60 days:
Action Step:

Which EBPP Practice Does This Align With?

- ☐ Standardized workflows
- ☐ Referral process improvement
- ☐ Clinical integration
- ☐ Community partnerships
- ☐ Workflow monitoring/QI

Why this matters:

What will success look like? (simple + measurable)

Who needs to be involved?

Part 5: Keep It Alive (Between Now and Session 6)

Return to this section after the session.

- New insights about workflows:
- Feedback from team or partners:
- Barriers encountered:
- Adjustments to your action step: