FY24-25 Syndemic Service Navigation Guidelines

Implementing Syndemic Navigation Services Washington State

Office of Infectious Disease Washington State Department of Health

January 1, 2024 – June 30, 2025

<u>Note:</u> These navigation services will be updated regularly throughout the contract year as syndemic navigation programs are developed. Input from funded agencies will be used to further develop these guidelines, including the Provide syndemic navigation module. There will be regular opportunities to provide input throughout the contract year.

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Service Category Definition

Syndemic Service Navigation

Syndemic service navigation refers to providing client-centered activities focused on improving access and retention in needed prevention and care services. Service navigators provide coordination, guidance, and assistance in accessing the medical, social, community, legal, financial, employment, vocational, and/or other needed services. Services may also include assisting eligible clients to obtain access to other public and private programs for which they may be eligible, such as Medicaid, Children's Health Insurance Program, Medicare, State Pharmacy Assistance Programs (including PrEP Drug Assistance Program), Pharmaceutical Manufacturer's Patient Assistance Programs, Department of Labor or Education-funded services, other state or local health care and supportive services, or private health care coverage plans. Services includes all types of encounters (e.g., face-toface, electronic, telehealth, phone contact, and any other forms of communication).

Core Activities

Activities must include the following:

- Initial assessment of service needs
- Development of a comprehensive individualized service plan that addresses the client's self-identified goals and needs
- Timely and coordinated access to medically appropriate levels of health and support services and continuity of care
- Client-specific advocacy and/or review of utilization of services
- Continuous client monitoring to assess the efficacy of the navigation/service plan

Additional Activities

Syndemic Service Navigation includes, but is not limited to, the following additional activities as appropriate for the client's self-identified needs:

- Outreach to locate clients.
- Re-engagement of clients previously engaged in syndemic navigation services, if necessary.
- Coordination of a navigation plan to ensure clients are appropriately referred and linked to supportive services.
- Linkage to a broad array of services, including:
 - ✓ PrEP and PrEP retention support.
 - ✓ HIV community services, such as a warm hand-off to an HIV case manager or HIV navigation specialist, and/or a warm hand-off to a clinic or medical provider treating HIV
 - ✓ STI care and treatment services, including a warm hand-off to a clinic or medical provider treating STIs and support to complete the treatment.
 - ✓ Viral hepatitis care and treatment, including a warm hand-off to a clinic or medical provider treating hepatitis B and/or hepatitis C and support to complete hepatitis C treatment through to cure.
 - ✓ Harm reduction services, including a warm hand-off to harm reduction services inclusive of referrals and/or provision of syringe services programs (SSP).
 - Sexual health education and supportive services, such as access to vaccines for vaccine-preventable STIs (HPV, HBV), supportive MPox services, cervical and anal cancer screening, and reproductive health care (including pregnancy testing, pregnancy options, abortion, and birth control).

- ✓ Gender-affirming care services including, but not limited to, education and support for accessing health care (e.g., hormone therapy, genital, breast, and chest reconstruction, facial plastic surgery, speech therapy, urologic care, and psycho-social services).
- ✓ Mental health counseling services and substance use services, including medications for opioid use and contingency management services, where possible.
- ✓ Treatment, including medications for opioid use.
- Health benefits navigation and enrollment (e.g., Insurance navigation, enrollment, and utilization).
- ✓ Appropriate supportive and social services, such as food banks and food programs, Supplemental Nutrition Assistance Program (SNAP), housing programs, employment services, or other services that address social determinants of health.
- Transportation support, including, but not limited to accompanying clients to appointments and providing transportation vouchers (e.g., bus passes, cab vouchers).
- Timely, routine follow up with clients, as necessary.
- Development or enhancement of systems for assisting clients with navigating services (obtaining necessary information, support, and skills to access complex medical systems).
- Condoms provided to 100% of priority population members who are sexually active and for whom condoms are appropriate (see note on condoms below in section 2.3).

Syndemic Service Navigation Outcomes

- # and % of navigation clients linked to PrEP or nPEP
- # and % of navigation clients linked to STI treatment (GC/CT, Syphilis)
- # and % of navigation clients linked to viral hepatitis treatment
- # and % of navigation client linked to services to address substance use (e.g., SSPs, substance use treatment services)
- # and % of navigation clients linked to mental health counseling or other services
- # and % of navigation clients linked to other supportive services (housing, employment, mental health services, insurance/benefits programs.

Program Requirements

- Partner with relevant agencies and providers, including those able to reach and engage priority populations;
 health care provider(s) offering PrEP services; medical provider(s) able to provide STI or viral hepatitis treatment
 or care; and additional health and support services as needed or requested by priority populations. (See Scope
 of Work checklist in Exhibit J for details on MOUs/MOAs required. Note that some formal partnerships may be
 discussed/developed in contract negotiations with the apparently successful applicants.)
- Gather client satisfaction and feedback data to ensure service provision aligns with client needs and that program uses client feedback to better meet client needs.
- Develop strategies to collect and report any required syndemic navigation data variables to DOH, documenting client-level services provided including referral outcomes, services provided, and materials distributed. (Note: Syndemic navigation services cannot be delivered anonymously, as some information is needed to facilitate necessary follow-up and care.)
- Participate in DOH trainings and capacity building activities for staff providing syndemic navigation services.

Priority Populations

Priority populations for service navigation include:

- People systemically marginalized and underserved due to racism Black, Latino/Latina/Latine/Latinx, Native American/Alaska Native people and other communities for whom there are documented health disparities in your region.
- Men who have sex with men.
- Gender expansive/transgender individuals.
- People who use drugs.
- People engaged in sex work

Service Definitions and Data Tracking

Syndemic Service Navigation Service Definitions

Below are definitions for syndemic navigation service options from the Provide multi-select menu under 'Progress Log'

PrEP Services Cascade

- PrEP Linkage <u>OR</u> Link to PrEP Provider (Confirmed)
 - Successful linkage of client of client to PrEP Provider. Note: this must be confirmed by client or provider.
- PrEP Rx Obtained (Confirmed)
 - Client obtained PrEP prescription from Provider. Note: this must be confirmed by client or provider.
- PrEP Initiated (Confirmed)
 - Successful initiation of PrEP by client. Note: this must be confirmed by client or provider.

Referrals & Linkages

- Linkage to Other Supportive Services- STI Treatment
- Confirmation that linkage was made to STI treatment services. Note: please provide details of support provided 'Brief Description' box in Progress Log.
- Linkage to Other Supportive Services- AVH Treatment/Care
 - Confirmation that linkage was made to AVH treatment or care. *Note: please provide details of support provided 'Brief Description' box in Progress Log.*
- Linkage to Other Supportive Services- Gender Affirming Care
 - Confirmation that linkage was made to services related to the provision of gender affirming care. Note:
 please provide details of support provided 'Brief Description' box in Progress Log.
- Linkage to Other Supportive Services- Food & Nutrition
 - Confirmation that linkage was made to services related to food and nutrition. Note: please provide details of support provided 'Brief Description' box in Progress Log.
- Linkage to Other Supportive Services- Harm Reduction Services
 - Confirmation that linkage was made to harm reduction services. *Note: please provide details of support provided 'Brief Description' box in Progress Log.*
- Linkage to Other Supportive Services- Sexual Health Education
 - Confirmation that linkage was made to services related to the provision of sexual health education. *Note:* please provide details of support provided 'Brief Description' box in Progress Log.
- Linkage to PAHR Services (Negative)
 - Confirmation that after an HIV Test event that has a negative outcome, the client wishes to continue to
 access additional prevention-focused services offered at your agency or a partner agency (navigation,
 condoms, testing reminders, etc).
- Linkage to Case Management (Positive)
 - Confirmation that after a HIV Test event that has a positive outcome, the client is connected with case management services at an agency offering case management services.
- Linkage to Medical Care
 - Confirmation that linkage was made to a primary care provider. *Note: please provide details of support provided 'Brief Description' box in Progress Log.*
- Linkage to Other Supportive Services- Substance Use

• Confirmation that linkage was made to supportive services that provide support related to substance use.

Note: please provide details of support provided 'Brief Description' box in Progress Log.

Linkage to Other Supportive Services- Housing

• Confirmation that linkage was made to supportive services that provide support related to housing. *Note:* please provide details of support provided 'Brief Description' box in Progress Log.

Linkage to Other Supportive Services- Mental Health Services

• Confirmation that linkage was made to supportive services that provide support related to mental health.

Note: please provide details of support provided 'Brief Description' box in Progress Log.

Linkage to Other Supportive Services- Culturally-Specific Services

Confirmation that linkage was made to culturally supportive services. Note: please provide details of support
provided 'Brief Description' box in Progress Log.

Linkage to Other Supportive Services- Employment Resources

• Confirmation that linkage was made to supportive services that provide support related to employment.

Note: please provide details of support provided 'Brief Description' box in Progress Log.

Additional PrEP & Insurance Navigation Services

PrEP Education—Individual

Provision of individual level PrEP education activity.

PrEP Navigation—Risk Assessment

Completion of a risk assessment with client including the completion of the Standardized PrEP Screening
 Tool and the input of client level data into Provide.

PrEP Navigation—Action Plan (before Rx filled)

- Development of an Individualized Service Plan with a client before they are linked to PrEP and fill their prescription.
 - If service plan extends after client fills PrEP Rx, service becomes categorized as PrEP Retention.

PrEP Navigation—Adherence Counseling (before Rx filled)

- Provision of assistance with a client in developing strategies to prepare for a daily PrEP regimen before they
 are linked to PrEP and fill their prescription.
 - If adherence counseling is discussed AFTER a client's linkage to PrEP and filling a prescription, service becomes categorized as PrEP Retention.

PrEP Navigation—Benefits Navigation

 Provision of assistance with a client in enrolling or utilizing PrEP benefits including, but not limited to, PrEP DAP, Gilead Advancing Access Co-Pay Program, Patient Assistance Network.

PrEP Retention—Adherence Counseling (after Rx filled)

- Provision of assistance with a client in adhering to daily PrEP regimen after they are linked to PrEP and fill their prescription.
 - If adherence counseling is discussed prior to a client's linkage to PrEP and filling a prescription, service becomes categorized as PrEP Navigation.

PrEP Retention—Action Plan (after Rx filled)

 Development of an Individualized Service Plan with a client after they are linked to PrEP and fill their prescription. • If service provision happens prior client's linkage to PrEP and filling a prescription, service becomes categorized as PrEP Navigation.

PrEP Retention-- Linkage to Other Supportive Services (after Rx filled)

 Development of an Individualized Service Plan with a client after they are linked to PrEP and fill their prescription that includes supporting client linkage to other supportive services.

Insurance Education—Individual

Provision of individual level insurance education activity for clients who may acquire HIV or STIs.

Insurance Enrollment

Provision of insurance enrollment assistance to a client who is currently uninsured and who may acquire HIV or STIs

o Insurance Utilization

Provision of assistance in supporting the use of a client's health insurance benefits for clients who may
acquire HIV or STIs. This can include things like working with a client to determine cost of an insurance
benefit or assistance in finding an in-network primary care doctor.

Insurance Navigation/Coordination

 Insurance navigation must include the development of an individualized service plan with a client who may acquire HIV or STIs.

Sexual Health Education Support

Provision of individual level sexual education activity for clients who may acquire HIV or STIs.

Transportation Support

• Provision of transportation support to a client accessing navigation services to ensure they are able to access necessary services. *Note: please provide details of support provided 'Brief Description' box in Progress Log.*

Active Referral Definition

WA DOH follows the CDC definition of 'active referrals'. An active referral involves efforts beyond passive referral, in which the individual is only given contact information for the service(s) and is left to make their own contact. There are varying types of active referral. Active referral may include but is not limited to activities for the client such as: making appointments, providing transportation, using a case manager or peer navigator to help with access to services, providing the organization to which the client is referred with information collected about the client (including the professional assessment of the client's needs), a "warm handoff" – such as a 'live' three way conversation (individual/organization making the referral, individual/organization receiving the referral, and the client) – in person or by telephone – in which the client is introduced, and providing explanations about what has already been done to assist the client and reason for referral.

Provide Guidance

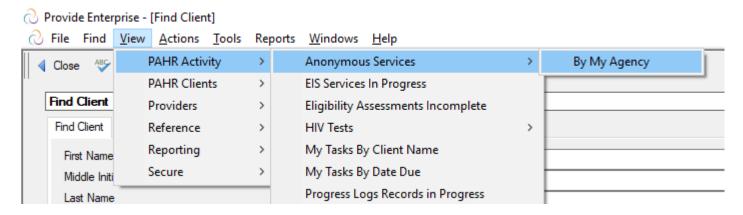
This is a high-level overview of the core functions of Provide for our syndemic-focused prevention services. This is made to be a refresher for those who have been trained to use Provide. For a more in-depth review of Provide, please access the full PAHR Provide Manual or Provide training videos. These can be found on the Provide Dashboard. Note: PAHR in Provide refers to Prevention And Harm Reduction (PAHR) Services

Provide- Anonymous Services

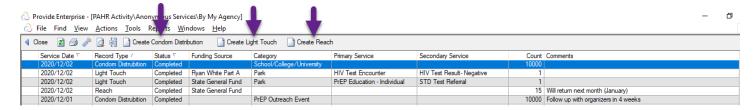
Anonymous Services is used to track services that do not require the collection of individual level client information and registration in Provide. These services include Reach & Condom Distribution.

To Access:

View→PAHR Activity→Anonymous Services→By My Agency

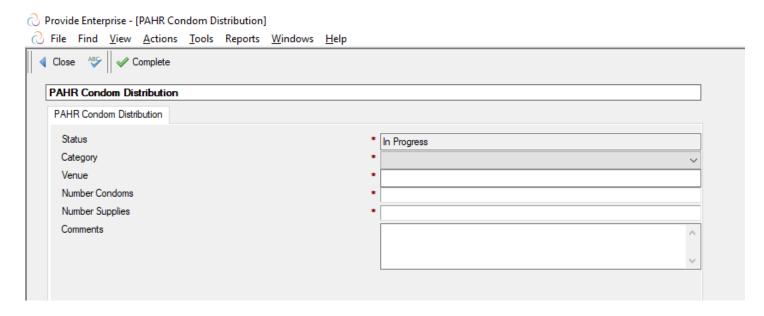


Use tabs at top of page to create a **Condom Distribution or Reach** entry. All entries will be listed on this main screen. Columns may be arranged or organized how you want.



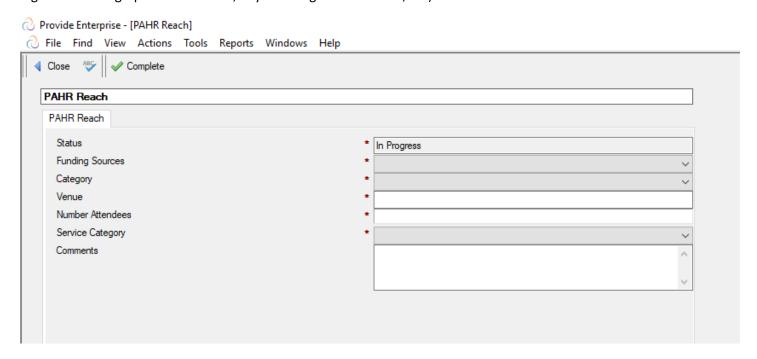
Condom Distribution

Select **Condom Distribution** tab. Complete all fields with * before submission. Comments section can include additional detail about condom distribution event.



Reach

Select **Reach** tab. Complete all fields with * before submission. Hit **Complete** when finished. Comments section can include additional detail about Reach session. Comments section can include additional detail about Reach session (eg: high level demographic information, any meaningful encounters, etc).

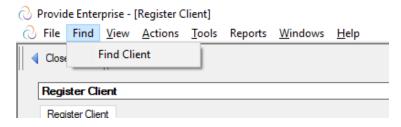


Provide- Find Client

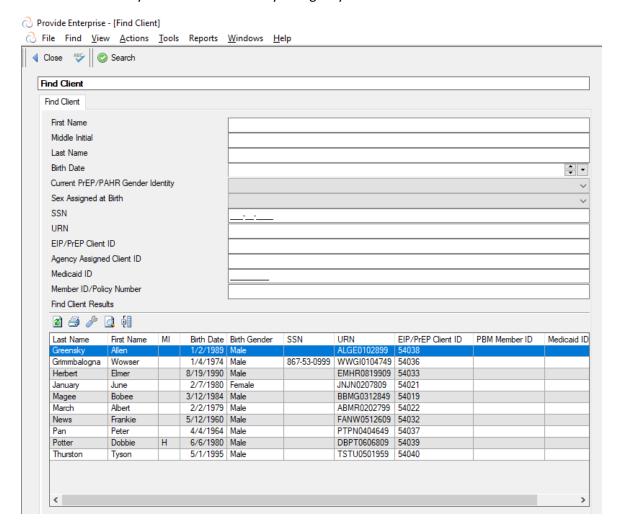
This should be the default home screen. You can use any of the fields below to search for a client.

To Access:

Find → Find Client



- Clients that meet search criteria will show up on the bottom of the screen.
- To open a client profile, double click on the client in the drop down list.
- You are only able to see clients at your agency.

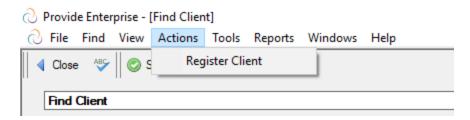


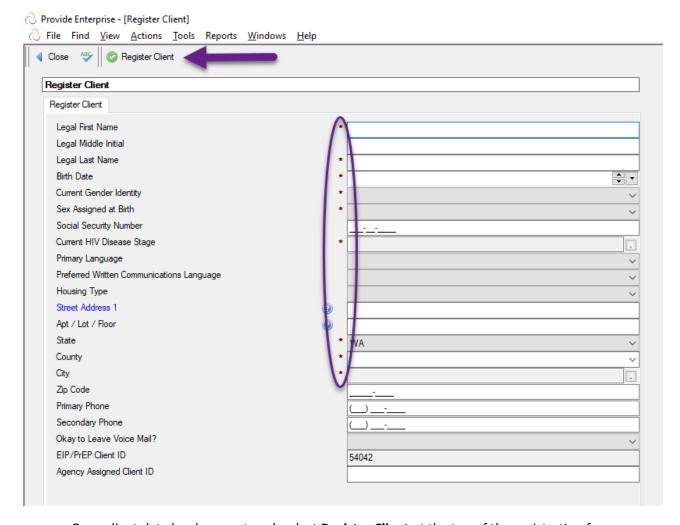
Provide- Client Registration

Each new client in Provide needs to be registered first. Registration can be completed by submitting * fields. However, it is encouraged that you collect as much information as possible at time of registration. Required fields for registration: Legal First Name, Legal Last Name, Birth Date, Gender Identity, Sex at Birth, HIV Status, County, and State.

To Access:

Actions → Register Client





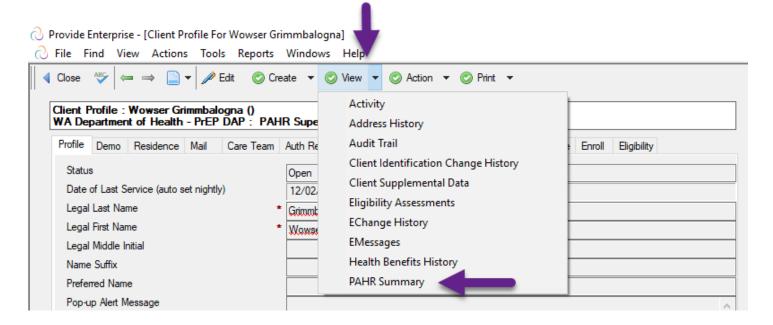
• Once client data has been entered, select Register Client at the top of the registration form

Provide- PAHR Summary

This will be where most of your client tracking will take place. From the client profile, choose **View**. Then choose **PAHR Summary** at the bottom of the drop down.

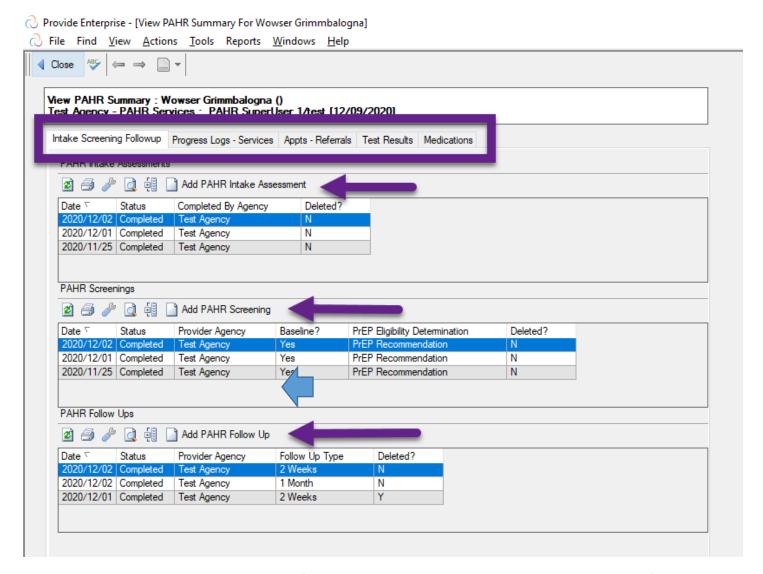
To Access From Client Profile:

View→PAHR Summary



Prevention & Harm Reduction (PAHR) Summary Home

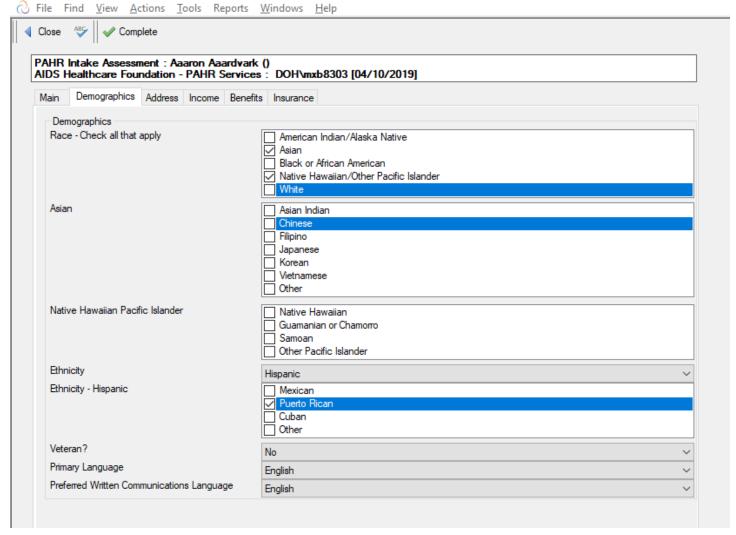
This is where you will access the majority of your client tracking tools related to Prevention Navigation. Here you can complete access **Progress Logs**, which includes **Services Provided**, **Appointments**, **Referrals**, and **Test Results**.



- PAHR Intake & Screening are required for all PrEP Navigation clients. PAHR Follow Up is required for Recommendation clients and is suggested for Consideration clients.
- PAHR Intake includes basic demographic information.
- **PAHR Screening** identifies client's eligibility and risk criteria and assigns them as a Recommendation, Consideration, or Other PAHR Services client.
- **PAHR Follow Up** includes routine follow up questions for Recommendation clients (or other clients that you want to support with a routine follow up schedule)

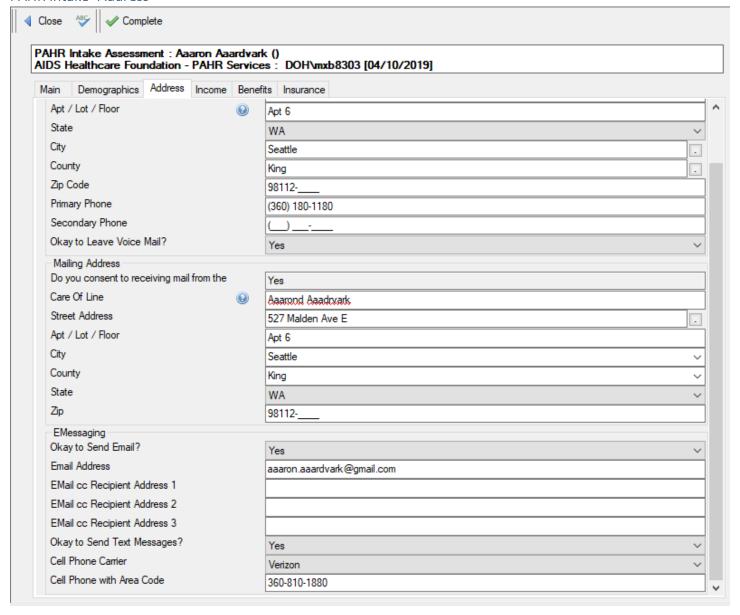
PAHR Intake- Demographics

Provide Enterprise - [PAHR Intake Assessment For Aaaron Aaardvark]



- Race- Multiselect option. Select all that apply.
 - o If Asian, country of origin options will become available.
 - If Native Hawaiian Pacific Islander, country of origin options will become available
- Ethnicity- Hispanic of Non-Hispanic options.
 - o If Hispanic, country of origin options will become available.
- Veteran Status- Optional
- Primary Language- English or Spanish
- Preferred Written Communication- English or Spanish
- Be sure to hit Complete when finished.

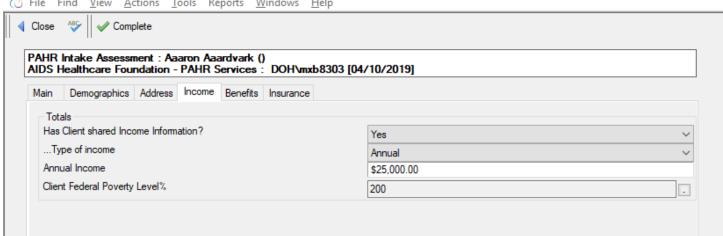
PAHR Intake- Address



- Complete as much as possible in the address form.
- E-Messaging is optional but is helpful for ensuring correspondences with client align with their preferences and that these preferences are documented.
 - **Note:** currently test messaging functionality is not enabled. This field will be used to validate enrollment into WelTel.
- Be sure to hit Complete when finished.

PAHR Intake- Income

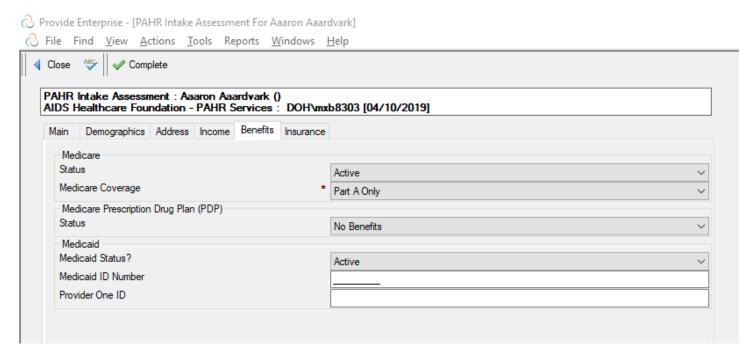




- Income is self-reported by the client. No documentation is needed.
- Type of Income- Annual or Monthly
- Annual Income- Write in
- Client Federal Poverty Level %- Populated automatically based on Annual or Monthly Income entered.
- Be sure to hit **Complete** when finished.

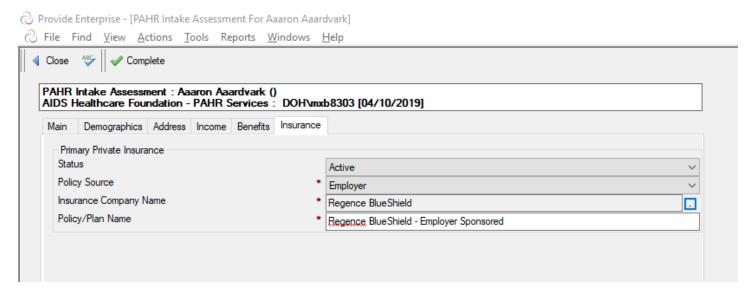
PAHR Intake- Benefits

• Used to track Medicare and Medicaid enrollment. Be sure to hit **Complete** when finished.



PAHR Intake-Insurance

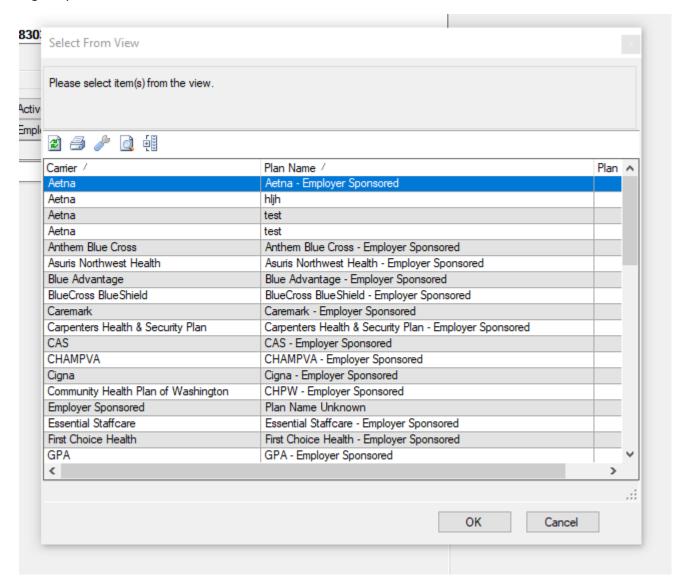
Used to track insurance status



- Policy Source: ACA Exchange, Employer, Individual
- Insurance Company Name: Pre-populates based on Policy Source
- Policy Plan/Name: Pre-populates based on Insurance Company Name
- Be sure to hit **Complete** when finished.

PAHR Intake- Insurance Options

Insurance options are pre-populated based on the available insurance plans in Washington. These will be updated regularly.

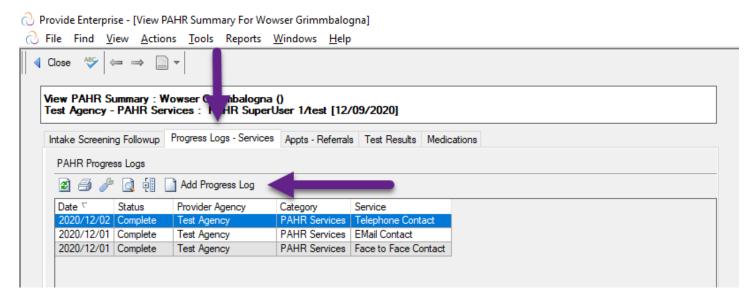


PAHR Progress Logs

Progress logs is the primary place where you will track services provided for all clients.

To Create Progress Log:

Progress Log→Add Progress Log

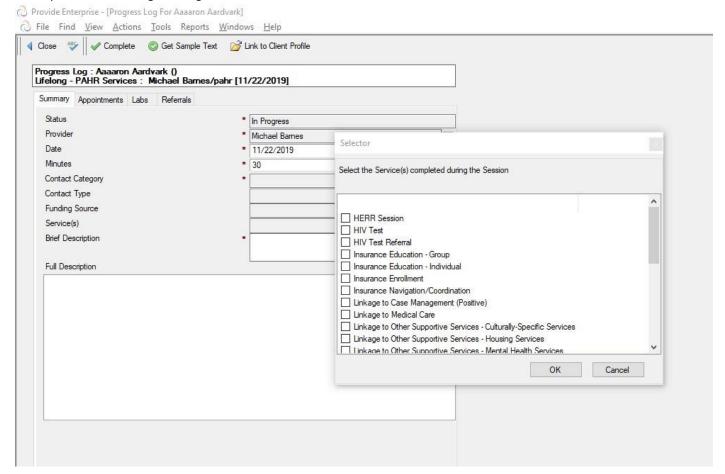


All Progress Logs completed will show up on this page. You can access prior Progress logs by selecting from this list.

PAHR Services Provided

Services provided is a multi-select box. You can select as many services as you supported a client in a single session. You can also track minutes with client; contact category; contract type. Description of a client session can also be added.

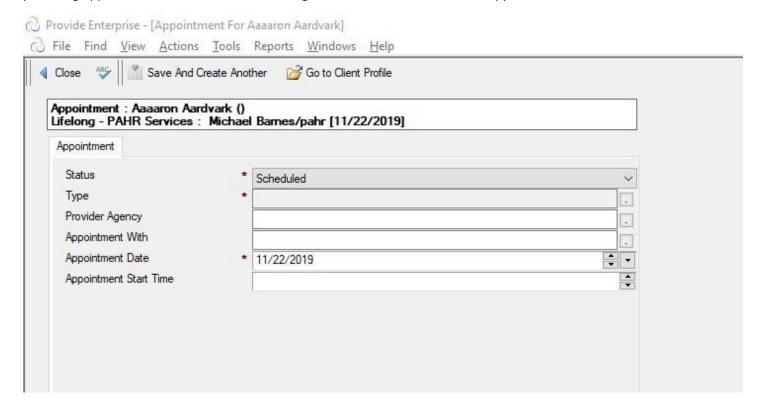
Note: for any linkage support provided, please include details of support (eg: location of linakge) provided 'Brief Description' box in Progress Log.



- Minutes: Enter number of minutes spent with client in session
- Contact Category:
- Contact Type:
- Brief Description: Free write

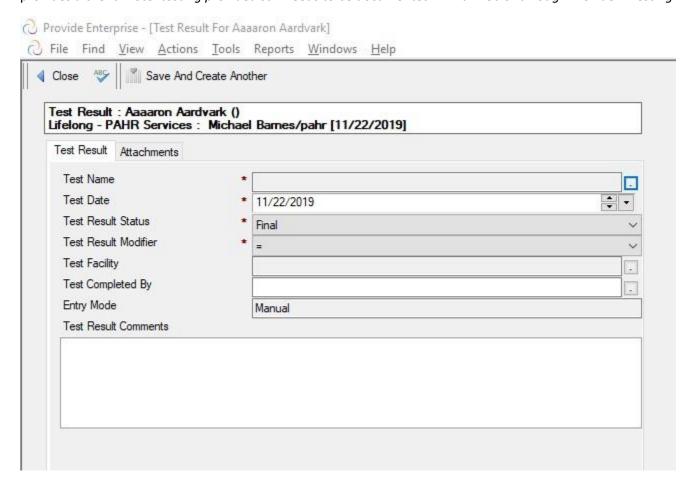
PAHR Appointments

Appointments can be track using the appointment tab. This is not a requirement but can help you support a client in providing appointment reminders or confirming whether a client attended an appointment.



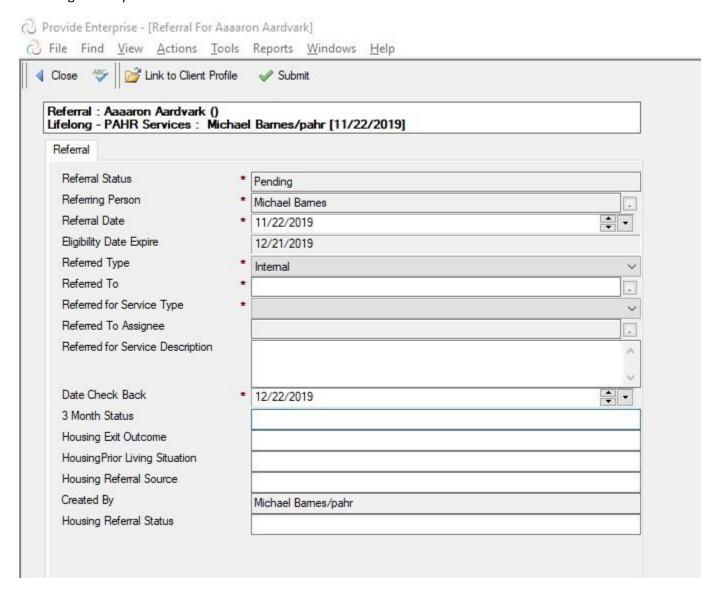
PAHR Labs

Client self-reported labs can be tracked with the labs tab. This is not a requirement but can help you track whether clients self-report they are accessing routine HIV/STI screening appointments or to track testing that your agency provides a client. Note: testing provided still needs to be documented in EvalWeb or through Provide →Testing.



PAHR Referral

PAHR Referrals are used to track referrals to other agencies and resources. This will be a valuable tool when referring clients to other DOH-funded agencies using Provide (internal referrals). It can also be used to track referrals and outcomes to external resources (eg: behavioral health; social services; health benefits navigation). It is highly encouraged that you use the referral feature.



Syndemic Prevention Services Portal

The <u>Syndemic Prevention Services Portal</u> is where you can access resources related to the implementation of Syndmeic Prevention Services. You can access guidance and training documents relevant to service implementation. These documents will be updated routinely.

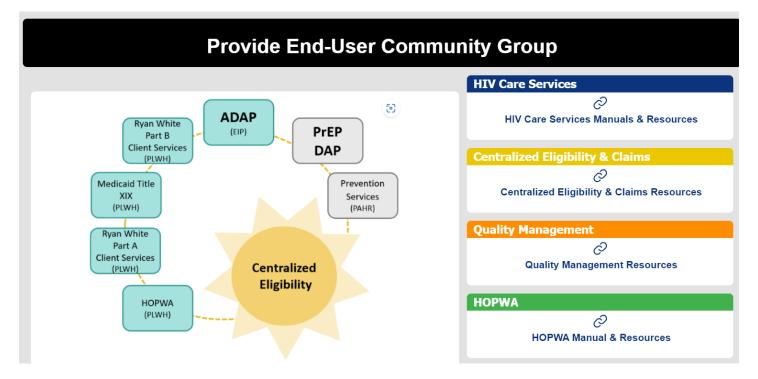
URL: Office of Infectious Disease Syndemic Prevention Services | Healthier Washington Collaboration Portal (waportal.org)



Provide End-User Community Group Dashboard

The <u>Provide Dashboard</u> is where you can access all Provide resources. You can also request database changes, add users, and request new VPN accounts, and view video recordings of training content. This content will be updated regularly.

URL: PROVIDE User Community Group - Smartsheet.com



FY23-25 Syndemic Prevention Services Training Schedule

*note: training schedule is subject to change

Quarterly:

Syndemic Service Navigator Learning Collaborative

Date: 4th Wednesday of March, June, September, December, March, June

Location: Virtual (Teams)

The **Syndemic Service Navigator Learning Collaborative** is an opportunity for navigators and program managers to connect with other navigators outside of their respective agencies to ask questions, learn about what other agencies are doing, and talk about challenges and successes in their work. DOH staff will also be on the call to provide input on a range of navigation specific topics and resources including things such as benefits navigation (PAPs, PrEP DAP), insurance navigation questions, and managing data collection. These calls will be driven by the navigators doing the Syndemic navigation work.

Syndemic Integrated Testing Learning Collaborative

Date: 4th Wednesday of April, July, October, January, April, July

Location: Virtual (Teams)

The **Syndemic Integrated Testing Learning Collaborative** is an opportunity for testers and program managers to connect with other testers outside of their respective agencies to ask questions, learn about what other agencies are doing, and talk about challenges and successes in their work. DOH staff will also be on the call to provide input on a range of testing specific topics and resources including things such as general DOH updates, test kit procurement, managing data collection, and reviewing statewide data. These calls will be driven by the testers doing testing work.