

*HEALing
Communities
Study KY and
Bluegrass Care
Navigators*

Medications for Opioid Use Disorder Linkage and Retention Care Navigator Training Manual



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HEALing Communities Study
Kentucky

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A Bluegrass Care Navigators-
Healing Communities Study®
Partnership



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List of Abbreviations

This glossary is a quick reference for abbreviations and acronyms used in this manual.

BCN	Bluegrass Care Navigators
CEU	Continuing Education Units
CLS	Criminal Legal System
DSM-5	Diagnostic and Statistical Manual of Mental Disorders 5th edition
EMR	Electronic Medical Record
FDA	U.S. Food and Drug Administration
HCS	HEALing Communities Study
HCS KY	Kentucky site of the HEALing Communities Study
KY	Kentucky
KY-OPEN	Kentucky Opioid Overdose Prevention Education Network
MI	Motivational Interviewing
MOUD	Medication for Opioid Use Disorder
OEND	Overdose Education and Naloxone Distribution
OTP	Opioid Treatment Program
OUD	Opioid Use Disorder
PCSS	Providers Clinical Support System
ROI	Release of Information
SAMHSA	Substance Abuse and Mental Health Services Administration
SOP	Standard Operating Procedure
SUD	Substance Use Disorder
TIP	Treatment Improvement Protocol
UK	University of Kentucky

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Introduction

The Need for Linkage and Retention Care Navigator Programs and this Training

The opioid epidemic in the United States continues to produce significant mortality, with an estimated 109,680 overdose-related deaths in 2022 (CDC). Medications for opioid use disorder (MOUD) are a critical first-line intervention to combat opioid use disorder. MOUD, specifically methadone and buprenorphine, have been demonstrated to reduce mortality, opioid misuse, property crime, and infectious disease rates (LaRoche et al, 2018; National Academies of Sciences, Engineering, and Medicine, 2019; Sordo et al, 2017; Wakeman et al, 2020). However, MOUD is vastly underutilized, as only approximately 15% of individuals who may benefit from MOUD receive it (Krawczyk et al, 2022).

The HEALing (Helping to End Addiction Long-termSM) Communities Study (HCS) is a community-engaged research intervention with a primary aim of reducing opioid overdose deaths by 40% in communities highly affected by the opioid epidemic (Walsh et al., 2020). The HCS intervention, Communities that Heal (CTH), seeks to implement evidence-based practices (EBP)s focused on overdose education and naloxone distribution (OEND); increasing access, linkage, and retention in MOUD; and increasing safer opioid prescribing and dispensing (Winhusen et al, 2020). A method for improving linkage and retention in MOUD was developed in Kentucky by deploying nurse and social work care navigators trained specifically in working with patients who use opioids.

Patient care navigation is an evidence-based intervention that improves patient engagement and health outcomes, including mortality reduction and more timely access to care (Carter et al, 2018; Kline et al, 2022). Care navigator services include addressing social determinants of health and barriers to care, increasing patient access and coordination among medical services, providing psychosocial support and advocacy, and delivering ongoing health education (Carter et al, 2018; Dixit, Rugo, & Burke, 2021; Kelly, Doucet, & Luke, 2019; Kokorelias, Shiers-Hanley, Rios, Knoepfli, & Hitzig, 2021). Recent evidence suggests that care navigation programs may facilitate MOUD linkage and retention as participants are more likely to initiate MOUD treatment (Anderson et al, 2023), less likely to be re-admitted for OUD related diagnoses (Gryczynski et al., 2021), and more likely to stay engaged in treatment at 30 and 90 day follow up (Nordeck et al, 2022).



Therefore, the HCS KY team partnered with Bluegrass Care Navigators (BCN) to develop two novel clinical care navigator training programs – the MOUD linkage program and the MOUD retention program. The linkage program aims to link individuals with OUD in various settings (e.g., syringe support programs) to medication for opioid use disorder (MOUD) treatment. The retention program aims to engage and promote retention with clients already in MOUD treatment who may be at risk for dropping out of treatment. To date, care navigation models have lacked clarity in scope and protocols for training of care navigator staff (Carter et al, 2018; Kline et

al, 2022). Thus, this manual was developed to provide a comprehensive training plan, ensuring all navigators have a shared vision of the work and goals of each program and receive the same foundational knowledge and skills to carry out the responsibilities outlined in each program.

How to Use this Manual

The HEALing Transitions Care Navigator training manual is divided into eight domains: (1) Onboarding and Administration, (2) Standard Care Navigation Training, (3) Substance Use Disorder (SUD) and Medication for Opioid Use Disorder (MOUD) Education, (4) OUD Specific Care Navigation, (5) Effective Client Assessment, (6) Implementation of the HEALing Transitions Linkage and Retention Program Procedures, (7) Opioid Overdose Education and Naloxone Distribution (OEND) Materials, and (8) Ongoing Education. Each component of the training manual can be accessed by clicking on its relevant section in the Table of Contents. A list of training requirements is also summarized in the [HEALing Transitions Training Plan](#). The training plan serves as a checklist where each care navigator can mark off training as they are completed.

Each training component in this manual is listed as a title. Information below each title includes the length and format of the training and a brief summary of the training. Materials related to training components are included as links in the sidebar to the left of the training information. Most of the training resources are available via a hyperlink. Note some links may be a file download.

Additional Considerations

Some training components of the HEALing Transitions care navigator program that are unique to HCS and our care navigator community partner, Bluegrass Care Navigators, are not included because they are unlikely to be helpful to other organizations. For example, there are standard operating procedures (SOPs) for handling administrative aspects of new care navigators hired



[e.g., setting up a Microsoft Teams Account, getting staff badges] that are not included. In some cases, trainings, SOPs, or other materials supporting an aspect of training/program implementation are noted to be available upon request. Please recognize that the training manual information contained herein may not be directly applicable to other organizations due to various issues such as local and state differences in regulation and policy (e.g., state variation in requirements for OEND). Regardless of these differences, we hope this manual provides a sample and scope of the potential resources that may be needed to successfully implement nurse and social work care navigator programs aimed at helping people with OUD link to and stay retained in MOUD treatment.

A client I worked with obtained full-time employment after utilizing the Goodwill Cars to Work program to purchase a vehicle. The client had lost her boyfriend to an overdose about a month after she started at her MOUD clinic. The therapist and I supported her through this loss, and she reported she regained a strength and motivation for her recovery. The client had discontinued care with her longtime PCP after she relapsed 2-3 years ago because she did not want to disappoint her PCP. With encouragement, she returned to her PCP and stabilized her medical and mental health conditions with appropriate care. The client took a leadership role at her residential recovery home and went on to obtain independent housing after about one year in sober living. - BCN Care Navigator



Domain 1

 **HEALing Transitions Onboarding Outline/ Checklist**

 **BCN Introduction to HEALing Transitions PowerPoint**

 **Sample BCN Linkage Palm Card**

 **Sample BCN Retention Palm Card**

Onboarding & Administration

The following information provides important details about orientation for care navigators in linkage and retention programs and associated administrative requirements.

Care Navigator Onboarding Checklist

Document review; approximately 15 minutes

When organizations choose to implement this training manual, an onboarding checklist providing training information and timelines for completion may aid in orienting the care navigator. A sample onboarding checklist is provided.

Introduction to HEALing Transitions Linkage and Retention Programs

PowerPoint presentation; approximately 1 hour

The goal of this training is to provide an overview of the HEALing Transitions linkage and retention programs. It describes program goals, typical partnerships, client eligibility guidelines, potential clinical assessment tools and forms, and procedures of the linkage and retention processes for these two distinct programs.

Linkage and/or Retention Palm Cards

Document review/creation; approximately 15 minutes

Palm cards are similar to business cards. The 3x5 cards provide an overview of the linkage or retention program as well as a picture and phone number of the navigator so that clients/potential clients can review the information and have a tangible reference to get in touch with the navigator as needed. A sample template for linkage and retention palm cards are provided. Please note that two identical palm cards are visible per sample due to print sizing (prints two to page).

General Healthcare Organization Training

Online; approximately 12 hours

Within the first 90 days of working as a BCN care navigator, navigators must complete 23 modules from the Relias® online learning coursework program. These modules provide an overview of topics such as Health Insurance Portability and Accountability Act (HIPAA), Corporate Compliance, Medical Safety (e.g., bloodborne pathogens, infection control), and Cultural Competence. This information is provided as a sample for other care navigator organizations to consider as part of their onboarding requirements.

Self-Care Resources

Materials review; approximately 15 minutes

As part of the onboarding process, we recommend that organizations make care navigators aware of resources available to help address their own self-care while working with high-risk clients. BCN self-care resources include free access to the Calm® App, self-care training, and additional supervision or processing meetings as needed. Organizations interested in using the Calm® App can find more information at the link provided.



Domain 2

Standard Care Navigation Training

Navigators who are part of the HEALing Transitions program complete all care navigator training that is standard to our care navigator community partner organization, Bluegrass Care Navigators (BCN). The BCN standard care navigation training consists of training in the basics of care navigation, locally available community resources, effectively utilizing teach-back methods to ensure client understanding, safety education, and client activation and engagement training. We recommend that all organizations implementing navigator linkage and retention programs ensure that care navigators are trained in similar content.

Understanding Privacy Laws Particular to OUD and Mental Health Treatment

Please note our team also provides training regarding securing appropriate releases of information (ROI) from clients and community partners. However, our ROI forms are not included below because they are partner-specific. We recommend agencies ensure that HIPAA/42 CFR Part 2 ROI consent forms and training are provided to care navigators.

Understanding Care Navigation and Barriers to Care

Live, online, or in-person; approximately 4.5 hours

The goal of this training is to provide a standard understanding of care navigator services and resources for common barriers. Topics of conversation for this training include basics of care navigation, active versus passive referrals, safety education, lists of common resource referral information to use in the HEALing Transitions programs, and common barriers to care and appropriate resources to tackle them (e.g., transportation, insurance navigation with details for Medicare and Medicaid, photo ID needs, immigration and naturalization, clothing, child care assistance, food assistance, Social Security benefits, housing resources, cell phone assistance, dental, vision, durable medical equipment, language barrier assistance, legal services, homelessness, and access to mental health/specialty care). Please note that many details of this training are specific to the region

 BCN Understanding Care Navigation and Barriers to Care PowerPoint

and resources available to HCS KY communities. We recommend that care navigation programs consult and develop their own local guide to available resources similar to the details of this PowerPoint to share as part of their standard care navigation training.

 **NIDA Words Matter Factsheet Website**

Non-Stigmatizing Language: NIDA "Words Matter"

Document review; approximately 10 minutes

All care navigators will review a brief fact sheet from the National Institute of Drug Abuse (NIDA) regarding stigmatizing language and its potential impact on clients and healthcare. Navigators will also review samples of non-stigmatizing language to replace potential stigmatizing language use.

 **Recorded MI Training with Free CE Credit**

Introduction to Motivational Interviewing (MI)

Live, online, or in-person; approximately 1.5 hours


The goal of this interactive training is to explain the key principles and processes of motivational interviewing with examples of each, review the stages of change and recognizing client language, and use of specific MI techniques such as open-ended questions, affirmations, reflections, and summaries (OARS); ruler/sliding scales; eliciting change talk; and reviewing a sample MI skill video.

 **Recorded MI Practice Session with Free CE Credit**

Motivational Interviewing (MI) Practice Session

Live, online, or in-person; approximately 1.5 hours

After completing the didactic introduction to MI, all BCN care navigators undergo one-on-one training with a supervisor to practice use of MI skills. We recommend a similar interactive training with supervisors to ensure all navigators can effectively utilize MI skills. The recorded training is an example of practicing MI skills after a didactic session available for free continuing education unit (CEU) credit.

 **AHRQ's The Share Approach Using the Teach-back Technique: A Reference Guide for Health Care Providers**

Effectively Utilizing Teach-Back

Live, online, or in-person; approximately 30 minutes

The goal of this training is to explain the teach-back method, describe helpful situations for when to use teach-back with clients, and role play/practice using the teach-back method.

Intimate Partner Violence Training

Live, online, or in-person; approximately 1 hour

The goal of this training is to learn basic concepts of intimate partner violence (IPV), including power and control, and barriers to leaving, and identify resources and interventions, both community and legal, that can aid IPV victims and their families in fleeing violent relationships.

Tracking Referrals and Outcomes

Self-paced, online; approximately 15 minutes

The goal of this training is to review processes for identifying and addressing barriers, tracking referrals, and outcomes in the BCN electronic medical record (EMR). We recommend that other care navigator programs educate their staff about how to best track their referrals, workload, and outcomes for each client using their own workflows.



Domain 3

SUD and MOUD Education


To successfully implement OUD linkage and retention programs, all care navigators must have a foundational knowledge of SUDs and more in-depth knowledge about OUD and its FDA-approved medication treatments. This education will be critical to understanding some of the concerns that clients may have about entering or remaining in MOUD treatment.



The following set of trainings are intended to provide an evidence-based foundation to understand OUD (and other SUDs); critical medication treatments for OUD, specifically methadone and buprenorphine; and effective communication and MI skills relevant to working with persons considering treatment with MOUD. This prepares navigators to answer questions about MOUD, identify symptoms of cravings and withdrawal, and help dispel myths and misunderstandings around OUD and its treatments. This section is comprised of HCS-developed trainings, including Kentucky Opioid Overdose Education Network (KY-OPEN) core sessions, as well as content from the Provider's Clinical Support System (PCSS) SUD 101 Modules and SAMHSA's Treatment Improvement Protocol (TIP) on MOUD.

The PCSS SUD 101 modules provide an overview of EBPs in the prevention, identification, and treatment of SUDs and co-occurring mental disorders. Care navigators who complete these modules should see an increase in their knowledge as they assist participants with their SUDs. All PCSS SUD 101 modules are available online at **SUD 101 Core Curriculum (2023)**. Please note care navigators will be required to create an account to access materials. Upon completing a module, the care navigator earns a certificate of completion. Care

navigators should save each of their certificates for training and CEU documentation. When completing the CEU forms, the care navigator should select the credit that applies best to them and their role (e.g. nursing or social work credit).

 **Changing Language to Change Care: Stigma and Substance Use Disorder Presentation**

Changing Language to Change Care: Stigma and Substance Use Disorder

Self-paced, online; approximately 1 hour

This training provides an understanding of the importance of language when discussing substance use and reviews ways to improve language and reduce stigmatizing language to improve care.

 **Overview of Substance Use Disorders Presentation**

Overview of Substance Use Disorders

Self-paced, online; approximately 1 hour

This training provides a foundation in knowledge of SUD including the spectrum of use, neurobiological responses to substances, theories that explain the disorders, public health impact and epidemiology, comorbidity, and integrated care for SUDs.

 **Screening, Assessment, and Treatment Initiation for SUD Presentation**

Screening, Assessment, and Treatment Initiation for SUD

Self-paced, online; approximately 1 hour

This training introduces screening tools for drug and alcohol use, reviews detailed medical and psychiatric assessment considerations, and discusses considerations for treatment referrals.

 **Medications for Opioid Use Disorder Presentation**

Medications for Opioid Use Disorder

Self-paced, online; approximately 1 hour

This training provides a foundational understanding of the evidence for each FDA-approved MOUD and compares each medication. It also includes discussion of a case vignette in which MOUD options are considered.

🔗 Principles of Motivational Interviewing: Useful for Primary Care Providers Presentation

🔗 Introduction to the Criminal Justice System and MOUD Presentation

🔗 Preventing Opioid-Involved Overdose with Education and Naloxone Presentation

🔗 Substance Use Disorders and Other Behavioral Health Screening and Assessment Video

Principles of Motivational Interviewing: Useful for Primary Care Providers

Self-paced, online; approximately 1 hour

This training introduces key MI principles, four key processes, the spirit of MI, patient-centered communication skills, and the importance of evoking change talk.

Introduction to the Criminal Justice System and MOUD

Self-paced, online; approximately 1 hour

This training provides a foundational understanding of the criminal legal system and how to help individuals involved throughout this system from arrest to incarceration to re-entry.

Preventing Opioid-Involved Overdose with Education and Naloxone

Self-paced, online; approximately 1 hour


This training provides an overview of overdose prevention education and prescribing naloxone to people at risk for opioid overdose.

SUDs and Other Behavioral Health Screening and Assessment Tools

Self-paced, online; approximately 1 hour

This training reviews commonly used SUD and Behavioral Health screening and assessment tools for various populations and teaches how to integrate screening and assessment tools into workflows.



 **Harm Reduction in Healthcare and Beyond Video**

 **MOUD Flyer**

 **MOUD Flyer Video**

 **MOUD Flyer Training Checklist**

 **SAMHSA TIP 63**

Harm Reduction in Healthcare and Beyond

Self-paced, online; approximately 1 hour

The goal of this training is to understand the history and philosophy of harm reduction as related to drug use, articulate benefits and challenges of harm reduction and preventative medicine practices in formal healthcare settings, and employ specific harm reduction interventions for routes of administration and substances related to opioid use disorder.

MOUD Flyer Training

Live, online; approximately 1.5 hours

HCS created a MOUD Educational flyer intended to present information about MOUD to persons with OUD and other community members in accessible language. The purpose of this training is to ensure care navigators are able to address questions and improve health literacy of clients they work with. Please note that in addition to watching the video provided above, care navigators also review and engage in roleplays to practice providing education using the MOUD flyer.

MOUD Flyer Training Competency Checklist

Live, in-person/virtual meeting; approximately 30 minutes

The goal of this training is to ensure every care navigator is comfortable and competent in being able to deliver MOUD education for linkage and retention services. MOUD flyer competency checklists are scheduled as one-on-one meetings between the care navigator and supervisor to role play together, ensure competence and confidence/ address areas of strength and for growth, and indicate field readiness for MOUD education delivery.

SAMHSA Treatment Improvement Protocol (TIP) 63


Document Review; approximately 30 minutes

In addition to the trainings above, care navigators review SAMHSA TIP 63 - Medication for Opioid Use Disorder. This guide provides a comprehensive review of the evidence base and detailed information about each FDA-approved medication and includes many other helpful resources and sample forms for providers, clinicians, case managers, and other professionals.


Domain 4

OUD Specific Care Navigation Training

The following trainings are designed to provide care navigators with additional information and skills that are specific to care navigation for clients with an opioid use disorder. They provide an overview of the OUD care continuum, explain how care navigation with the OUD linkage and retention programs fits within the care continuum, and discuss OUD specific resources for clients.

 **Linkage & Retention in OUD Care: Creating a Culture of Engagement Using Care Navigators Video**

 **Orientation to Community Resource Guides Video**

 **Sample Community Resource Guide (Boyd County KY)**

 **Sample OTP Guide: Welcome to BHG**

Linkage and Retention in OUD Care: Creating a Culture of Engagement Using Care Navigators

Live, online, or in-person; approximately 1 hour

The goal of this training is for navigators to understand the magnitude of the opioid pandemic; define and describe the terms linkage, engagement, and retention in OUD care; explain the OUD care continuum; and discuss and describe interventions for how navigators can assist OUD patients engage and remain in care.

Orientation to Community Resource Guides (CRGs)

Self-paced, online; approximately 10 minutes

This training describes the CRGs that were created through HCS KY to facilitate MOUD linkage and retention. Please note that while these resource guides were created for specific communities in KY, this training may be applicable to help other communities create and utilize similar resources to address their clients' needs.

Orientation to Opioid Treatment Programs (OTPs)

Live, in-person; approximately 1 hour

To understand the resources and services of OTPs, care navigators working with these settings have an opportunity for a tour of one of the programs. All care navigators also have access to OTP guides for each community, which are one-page documents that explain how care navigators can help clients gain rapid access to methadone treatment and share key facts about OTPs that care navigators may want to explain to prospective clients.

- 🔗 What Care Navigators Need to know about CLS Venues Video
- 🔗 What Care Navigators Need to Know about CLS Venues PowerPoint
- 🔗 Sequence of Events in CLS Entry Graphic

🔗 The Adjudication Process in KY's Criminal Legal System Video

🔗 HCS Care Navigators: A Discussion on Boundaries Slides

Introduction to Criminal Legal System (CLS) Training

Self-paced, online; approximately 1 hour

This training provides an overview of the relationship between OUD and the CLS, acquaint care navigators to CLS venues in which they may work, and provide context for education and working with clients who may be involved in the CLS. Please note that these materials are specific to KY local and state organizations but may still provide useful information for other organizations.

Note: As of August 2022, the KY HCS “criminal justice” team changed its name to the “criminal legal system” team. The materials above were created prior to this change and thus utilize “criminal justice/CJ” terminology.



Overview of the Adjudication Process in KY's Criminal Legal System

Self-paced, online; approximately 30 minutes

The goal of this training is to explain when and how clients may experience a pre- and post-sentencing change in custody during the adjudication process. This training will help identify key court hearings where changes might be made to aid in anticipating client release dates in preparation for linkage. The training also helps care navigators understand the importance of coordinating with clients to communicate their treatment needs to their public defender/alternate sentencing workers pre-release or parole officer post-release. Please note that this is specific to KY, so other states may need to adapt.

A Discussion on Boundaries

Live, in-person or online; approximately 2 hours

As navigators work with individuals with OUD in the field, issues around creating and maintaining healthy professional boundaries will arise. This training was created in response to direct feedback from our partnering care navigator agency regarding some situations that had arisen within their work.

Domain 5

Effective Client Assessment

Care navigators must be able to accurately assess OUD, understand a client's history with OUD and treatment, and identify critical co-morbid conditions and risk factors as well as client strengths and goals. This section provides sample educational resources for client assessments and how to utilize this knowledge and information to aid in a client's treatment, remission, and recovery.

 [DSM-5 Checklist for Substance Use Disorder](#)

Diagnostic and Statistical Manual of Mental Disorders (DSM-5) Checklist for OUD Training

Document review; approximately 10 minutes

Care navigators undergo an overview of how to utilize the DSM-5 SUD checklist to screen linkage clients for opioid use disorder. The material provided is a sample of the DSM-5 SUD checklist navigators use during initial assessments. Also note that while navigators use the checklist as part of their initial assessment, they are not diagnosing OUD. A formal DSM-5 diagnosis of OUD should be made by a client's MOUD provider.

 [OUD Treatment History Table For Linkage Clients](#)

OUD Treatment History for Linkage Clients Training

Document review and training; approximately 10 minutes

It is important for navigators to understand and be able to obtain a client's history and current experience with substance use treatment and recovery support. Thus, navigators are trained in how to ask questions and complete an OUD treatment history as part of the initial linkage assessment.

 [Care Navigator Goals Form Training Video](#)

SAMHSA TIP 63 Goals Form Training

Self-paced, online; approximately 10 minutes

 [SAMHSA TIP 63 \(See Goals Form Section 5-41\)](#)

This training provides an overview of how to use a goals assessment with linkage or retention program clients that may have difficulty engaging in MOUD or outlining their goals and how MOUD and care navigation services may aid them in their remission and recovery process. The materials provided include a video of how to use the form as well as access to a goals-setting form provided through TIP 63.

[C-SSRS Training Website](#)

[PowerPoint on How to Access C-SSRS Trainings](#)

[QPR Institute Website](#)

Columbia Suicide Severity Rating Scale (C-SSRS) Training

Self-paced, online; approximately 1 hour

This training provides an overview of how to conduct this suicide screening assessment and the recommended actions based on potential responses. The training also includes case vignette scenarios for practice.

Note: Care navigators must register on this website to complete online modules.

Question, Persuade, Refer (QPR) Suicide Prevention Training

Self-paced, online; approximately 1 hour

This training provides an additional form for assessing suicidality in clients that may be experiencing suicidal ideation. This training dispels myths about suicide and ensures that care navigators understand and recognize warning signs, including how to respond to someone who is potentially suicidal.

Note: Many National Alliance on Mental Illness (NAMI) chapters offer QPR training at no cost. Contact your local NAMI chapter for details.



Domain 6

Implementation of HEALing Transitions Linkage and Retention Programs

The following set of trainings are designed to further explain the HEALing Transitions linkage and retention programs in detail and the SOPs for successful implementation of each program. Please note that in addition to the SOPs provided below, HEALing Transitions has additional protocols for communication across various teams as well as SOPs for implementing our barrier relief, transportation assistance, and housing assistance programs utilizing HCS grant funds. Because these programs are specific to our organization and HCS, the SOPs are not included in this manual but can be provided upon request.

 **HEALing Transitions Linkage SOP**

HEALing Transitions Linkage SOP

Document review; approximately 15 minutes

Care Navigators should review this SOP to understand the goals, eligibility, and processes for admitting and completing the linkage program with clients.

 **Care Navigator Linkage Roleplay Video**

Linkage Roleplay Training

Self-paced, online; approximately 30 minutes

The goal of this training is to provide a sample scenario where navigators can watch a case of how to engage a new linkage client from first contact through the initial components of the intake process. After watching this video, care navigators should complete a similar mock/role-play scenario to ensure comfort with the linkage process.

 **HEALing Transitions Retention SOP**

HEALing Transitions Retention SOP

Document Review; approximately 15 minutes

Care navigators should review this SOP to understand the goals, eligibility, and processes for admitting and completing the retention program with clients.

Referral Document Workflow Review

Document review; approximately 10 minutes

This document is designed to provide a one-page overview of the referral process and decision-making tree regarding eligibility for inclusion in the linkage or retention programs. We provide this as a sample of recommended eligibility requirements for other organizations to consider for linkage and retention program implementation. Additionally, please note that the referral workflow processes provided in the sample below may need to vary for other organizations by state and local policies and community partnering relationships.

Data Collection Forms Training

Live; online or in person; approximately 4 hours

In order to effectively evaluate the linkage and retention programs, data collection forms were created and integrated into the Bluegrass Care Navigator EMR. These forms include Intake Assessments, ROI and Consent for Care, Care Plans, Linkage Contact Notes, Retention Contact Notes, Risk Stratifications, OEND Forms, BCN Readmission Root Cause Analysis Processes, and Linkage and Retention Discharge Summary

Forms. As part of the onboarding process, training in each form and how to complete them is provided. Though the medical record platform is accessible to Bluegrass Care Navigators only, word documents of the data collection forms to understand the content are provided in the linked materials.



Transition Plan Review, Update, and/or Create

Document Review/Creation; approximately 1 hour

The Transition Plan is a form designed to help care navigators and their supervisors understand the key persons/points of contact at the agency where they will be deployed temporarily (e.g., to help cover for a navigator who will be away for an extended absence, while hiring/onboarding new staff) or permanently (e.g., previous navigator is leaving their position). The document summarizes relevant information about the specific agency and is meant to facilitate onboarding and/or needs for cross-coverage due to navigator absences. We recommend that care navigators deploying to community agencies create or update transition plans to facilitate continuity and consistency among operations at community partner sites. A template for completing transitions plans is provided.

Field Experience

Live; in-person; Varied time frames

The goal of field experience is to provide opportunities for shadowing of care navigators in clinic or other settings and to complete any additional training that may be required by the specific partner agency in which a navigator is deployed. We recommend that new organizations implementing linkage and retention care navigator programs offer field experience and/or supervision as navigators are deployed to new agencies.

Competency Test

Live; in-person or virtual; approximately 15 minutes

Prior to deployment in community agencies, care navigators with BCN complete a competency test to ensure they understand the role, including the ability to provide effective OUD and MOUD education, reduce stigma, and identify and overcome barriers to linking and retaining clients in treatment with MOUD. We suggest that other organizations conduct a similar competency test prior to placement in community settings.

Domain 7

Overdose Education and Naloxone Distribution (OEND) Materials

As part of the HCS process, it is important that all clients are educated on opioid overdose and have access to naloxone. The following information includes videos and brochures that care navigators can use to educate their clients on opioid overdose and naloxone administration. Please note that our team also has internal training and SOPs regarding OEND processes and OEND data collection that are available upon request.

Overdose Education Video and Training

Self-paced; online; approximately 10 minutes

These training videos are available for care navigators to use to educate clients about opioid overdose and naloxone use. We recommend navigators acquaint themselves with the information to be able to talk with and educate clients about OEND. They may also share the video with clients as needed.

Overdose Education Tri-fold Brochure

Document Review; approximately 10 minutes

This brochure is another means of providing opioid overdose education that also describes how to use naloxone. We recommend navigators become familiar with the information in the brochure and provide additional education to clients using the brochure as needed.

[English How to Use Naloxone Video](#)

[Spanish How to Use Naloxone Video](#)

[Arabic How to Use Naloxone Video](#)

[HCS English OEND Tri-fold Brochure](#)

[HCS Spanish OEND Tri-fold Brochure](#)

[HCS Arabic OEND Tri-fold Brochure](#)



Domain 8

Ongoing Education

We recommend that navigators continue to engage in training/educational opportunities regarding topics related to OUD.

 **KY OPEN Recordings**
(CE Central)

KY-OPEN Recordings

Self-paced, online; approximately 1-1.5 hours each

HCS offers free recordings of KY-OPEN sessions on a variety of OUD-related topics that also include CEUs. New material will continue to be added throughout 2024, and materials will be available to view for three years from their initial posting date (available until 2025-2027).

 **HEALing Transitions**
Weekly Team Meeting
Agenda Template

Weekly Interdisciplinary Team Meetings

Live, online or in-person; approximately 1 hour each

To benefit from the knowledge and expertise of clinical supervisors, medical directors, and other navigators with different training backgrounds (social work or nursing), regular interdisciplinary team meetings serve as forums for sharing of resources and ideas and promote resiliency and wellness for care navigators. We recommend that organizations implementing these care navigators programs structure regular weekly meetings for efficiency and effectiveness of implementation.



A client was released on parole after serving 22 months in jail. After his release, the client was able to get his ID, birth certificate, activate his Medicaid, and get his social security card. He was linked to MOUD with suboxone, and barrier relief funding was approved for the client to receive an electric bike since he owes \$15,000 in fines before his license can be reinstated. The client was ultimately linked and placed in the retention program. It was amazing to see all this client accomplished in the few weeks after he was released. - BCN Care Navigator

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