

Patient Navigator (PN) Entry-Level Competency Statements

FOUNDATIONAL COMPETENCIES - KNOWLEDGE AND AWARENESS OF:

Domain: Ethical, legal, and professional issues

Competency: Demonstrates professionalism through adherence to organizational rules and regulations, ethical principles, and boundaries of the navigator's scope of work.

Examples of Performance Behaviors:

- Implements the navigator scope of work and role within the health care team.
- Supports patient/clients' rights in health decision-making.
- Maintains patient/client confidentiality.
- Adheres to basic policy and procedures in the health care and employer environment.
- Adheres to legal standards relevant to performance of job duties such as reporting of abuse/ neglect or behavior that is imminently harmful to self or others.
- Preserves human subject protection.
- Identifies and explains patient/ client rights and responsibilities.
- Consults with other members of the health care team on patient/client concerns that fall outside his/her scope of work.
- Maintains appropriate and accurate documentation of work performed
- Maintains appropriate personal boundaries with health staff and clients/patient/clients and family.
- Acts within scope of work.

Domain: Health beliefs and behavior

Competency: Understands the impact of individual health beliefs and behavior on health care decisions.

Examples of Performance Behaviors:

- Demonstrates understanding of whole person, culturally sensitive care.
- Identifies individual and cultural diversity in views of wellness/ illness and disability.
- Demonstrates effective strategies for delivering health information.
- Recognizes stages of behavior change.
- Understands motivators for behavior change.
- Integrates motivators for behavior change and the role of familial/social and environmental factors in designing effective treatment strategies.

**Patient Navigator includes Health Navigator, Resource Navigator, Lay-Navigator, Non-licensed Navigator, etc., but not licensed providers or lay Community Health Workers.*

Domain: Psychology of illness

Competency: Integrates knowledge of the social and emotional aspects of health into patient/client, caregiver and family interactions and support.

Examples of Performance Behaviors:

- Applies understanding of common reactions to a chronic disease diagnosis and living with chronic disease in communications with patient/clients, caregivers and family members.
- Recognizes common signs and symptoms of pathological reactions and/or mental illness and discusses them with other members of the health team.
- Acknowledges implications of psychological factors on how patient/clients, caregivers and family members are able to effectively work with the patient/client navigator.
- Recognizes issues in death and dying and their impact on relationships between patient/clients, caregivers, and family members.

Domain: Disease-specific knowledge

Competency: Demonstrates basic knowledge of health promotion, disease prevention and common disease care continuums.

Examples of Performance Behaviors:

- Understands basic pathophysiology of common chronic diseases.
- Provides basic health information relevant to screening- diagnosis- treatment of chronic diseases to patient/clients, caregivers and family members.
- Identifies emerging evidence and impact on practice.
- Recognizes common signs and symptoms of health emergencies and acts accordingly.
- Acknowledges common biopsychosocial impact of health procedures on patient/client, caregivers and family members.
- Demonstrates knowledge of and adherence to infection control, medical documentation and medical records procedures.

Domain: Healthcare system structure and function

Competency: Apply understanding of the health care system to improve client/patient/client care.

Examples of Performance Behaviors:

- Understands the role of each member of the health care team and their required skills and competencies.
- Utilizes the knowledge of public and private insurance/ payor programs, economic issues in the healthcare setting to make appropriate referrals to payor programs.
- Demonstrates knowledge of health care specialty disciplines.
- Demonstrates understanding of multiple specialties within care teams.
- Maintains appropriate recordkeeping and charting to facilitate coordinated care.

Domain: Resource and referral mechanisms and sources

Competency: Identifies and utilizes resources and appropriate referrals to reduce patient/client barriers to care.

Examples of Performance Behaviors:

- Identifies local, state, and federal assistance programs and informational resources relevant to patient/client's care.
- Conducts professional networking with other patient/client navigators to enhance knowledge of resources.
- Documents referrals made on behalf of patient/client.
- Maintains relationships with referral sources.
- Effectively advocates for appropriate community and social service resources for patient/clients.

**FUNCTIONAL COMPETENCIES -
DEMONSTRATING SKILLS AND UNDERSTANDING PROCESS OF:**

Domain: Patient/client/Client assessment

Competency: Conducts effective patient/client/client interviews to identify needs and strengths of patient/client/client.

Examples of Performance Behaviors:

- Identifies personal and system barriers to patient/client's use of the health system.
- Identifies patient/client and family strengths for managing the patient/client's current health condition.
- Elicits and recognizes common risk factors for other physical and emotional conditions.
- Establishes effective client relationships by building trust and open communication
- Provides continuous monitoring and follow-up to ensure that the client assessment is relevant to the current situation and makes changes to the care plan accordingly.

Domain: Client Interaction and Communication Skills

Competency: Establishes a professional relationship with patient/client/family by building trust and communicating in a collaborative manner.

Examples of Performance Behaviors:

- Engages client in preferred language.
- Uses active and reflective listening techniques.
- Identifies health communication issues such as health literacy that affect client knowledge and attitudes about their health care.
- Adapts oral and written communication skills to patient/client's literacy level.
- Demonstrates professional conduct and attitude.

Domain: Work within health patient/client care team and community

Competency: Demonstrates collaboration within and across the care team, patient/client and community agencies.

Examples of Performance Behaviors:

- Proactively anticipates barriers and challenges for patient/client in using healthcare and communicates these to the healthcare team.
- Adheres to the health care recommendations provided by the health team.
- Participates in the development of effective care strategies as part of an interdisciplinary client care team.
- Establishes relationships with local community leaders and communicates relevant program information.

Domain: Health care team-patient/client communication

Competency: Assists in the development and enhancement of appropriate and open communication between the patient/client and the health care team.

Examples of Performance Behaviors:

- Assists client in identifying concerns and questions to share with healthcare team.
- Reiterates provider recommendations using language that is clear to the patient/client.
- Participating in the development of effective treatment strategies as part of an interdisciplinary care team.
- Provides cultural mediation as needed, acting as a liaison between the healthcare system and client.
- Engages client in preferred language and/or obtains an interpreter as needed.
- Utilizes communication techniques that foster mutual respect

Domain: Appropriate referral for behavioral health or emergency medical care

Competency: Arranges referrals to behavioral and physical health providers for additional professional support.

Examples of Performance Behaviors:

- Recognizes and acts upon signs and symptoms of serious behavioral or physical health conditions, by addressing these with the client and healthcare team.
- Assists in the referral process and conducts timely follow-up.
- Communicates with client and health care team to facilitate palliative care as appropriate.

Domain: Care Coordination

Competency: Accesses, evaluates, and uses appropriate information and resources in designing client/patient/client-centered care plans.

Examples of Performance Behaviors:

- Applies knowledge of population health strategies /tools such as registries to reach populations to be served.
- Assesses client needs, strengths and readiness for change.
- Engages the patient/client in problem solving to identify, prioritize and reduce barriers to care.
- Performs collaborative goal setting with patient/client and healthcare team.
- Facilitates patient/client knowledge and skills for managing their health.
- Conducts appropriate and timely referrals to clinical and professional staff.
- Integrates care strategies with patient/clients' personal and cultural values.
- Creates and implements a patient/client-centered plan of care, integrating clients' personal and cultural values.
- Identifies individualized process and outcome measures for monitoring client progress and providing appropriate feedback to patient/client.
- Monitors client progress through ongoing follow-up.

Domain: Client activation, education and support

Competency: Facilitates the engagement of the patient/client in their health.

Examples of Performance Behaviors:

- Supports client in managing own health.
- Appropriately identifies the informational needs of the client and family.
- Evaluates and selects educational materials that match the health literacy level and cultural and linguistic needs of the patient/client.
- Provides interpretation of educational materials.
- Supports the client's ongoing need for information at different times throughout the episode of care.
- Utilizes effective techniques to empower personal actions relevant to adherence to health recommendations.
- Encourages health promotion and disease prevention behaviors to maximize health potential.
- Conducts referral to community resources and stimulation of clients' health promotion and disease prevention behaviors.

DEVELOPMENTAL COMPETENCY - DISPLAY INTEGRATIVE CAPACITY OF ALL KNOWLEDGE AND SKILLS

Domain: Professionalism and development

Competency: Optimizes practice as patient/client navigator through continual professional development.

Examples of Performance Behaviors:

- Recognizes one's limitations in health knowledge and professional competencies.
- Adopts healthy work practices to avoid burn-out.
- Identifies need for supervision and support.
- Demonstrates a commitment to self-assessment.
- Seeks out continuous learning and improvement in performance.

Domain: System change

Competency: Seeks to improve systems of care for patient/clients through the identification of systemic barriers and challenges.

Examples of Performance Behaviors:

- Able to identify and address health inequities.
- Able to identify which client barriers are systemic issues.
- Generates possible solutions with the client, health care team, and organizational leadership.
- Communicates solutions with organizational leadership to eliminate these systemic barriers.

Domain: Program development and management

Competencies: Participates in patient/client navigator program development, improvement and evaluation.

Examples of Performance Behaviors:

- Demonstrates the capacity to develop an effective navigator program.
- Develops program policies and procedures utilizing evidence-based and research-driven methods.
- Establishes effective referral networks with community-based agencies, other providers and patient/client navigators.
- Fosters relationships with community leaders, particularly within communities served.
- Develops program evaluation components which include process and outcomes indicators.
- Implements and monitor process and outcome measures.
- Reports evaluation results to funders and institutional leaders.
- Communicates evaluation results to peers in the research and navigator community through publications or presentations.

For questions about CDPHE's Patient Navigator Workforce Development Initiative, please contact Pat Uris at patricia.uris@state.co.us or (303)692-2577.