

Patient Navigator (PN) Entry-Level Competency Statements

Introduction

The Colorado Department of Public Health and Environment (CDPHE), Prevention Services Division, initiated the development a **voluntary** credentialing process to support the preparation, growth and sustainability of the unlicensed Patient Navigator workforce, Summer 2015. The credentialing program is based on competencies vetted for six years under CDPHE-funded grants. The competency statements represent generalist entry-level core competencies for unlicensed Patient Navigators. The statements describe the desired knowledge, skills and behaviors that enable PNs to perform successfully in the practice setting. The foundational competencies are those that cross-cut all functional competencies. The functional competencies represent day-to-day practice activities.

The competencies are written to apply broadly:

- Across a continuum of whole-person care,
- Across the lifespan,
- Across generations: children and elders in families or intergenerational relationships (that may involve guardians, family, caregivers, or others), not only as individuals apart from such relationships,
- Across a bio-psycho-social continuum of care,
- Whole-person centered and culturally sensitive services: tailoring care to patient values and preferences, culture and community, socioeconomic and health disparities, and religious, spiritual, gender, sexual orientation and other important identifications.

The competencies are not written for any particular model of care, practice specialty or targeted population. Healthcare settings will vary in terms of breadth and depth of PN competencies drawn upon. For example, some employers may emphasize PN work in the area of community relationships and referral, while others may focus on health screenings, team-based care for chronic diseases and behavior change, transitions in care or barriers to a specific type of care or to understanding health information. Additionally, these competencies serve as the basis for the development of PN training curriculum.

Competencies are not static and may evolve over time to meet the needs of an ever-changing health care system. The continued and ongoing competence of PNs is the responsibility of the individual PN and the employer.

**Patient Navigator includes health navigator, resource navigator, lay-navigator, unlicensed navigator, etc., but not licensed providers or community health workers.*

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.

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.

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- 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.

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

Domain: Patient/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 patient/client health 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.

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- 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.

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- 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: Patient/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.