Workforce competencies in patient navigation

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Learning Objectives

• Identify major efforts in oncology patient navigation workforce development including development of competencies, training and certification
• Access tools for patient navigation in practice
• Consider factors important for successful implementation of patient navigation
Background of navigators

- Social Work
- Nurse
- Non-Clinically Licensed
- Volunteer
Why competencies?

• Creates professional standards
• Provides framework for training
• Clarifies function and importance to
  – Grantors
  – Organizations
  – Payers
  – Policymakers
Collaborators in GW competency development

- Academy of Oncology Nurse & Patient Navigators
- Oncology Nursing Society
- National Association of Social Workers
- Association of Oncology Social Workers
- Association of Community Cancer Centers
- Patient navigators and CHWs
Roles and responsibilities

Professional Roles/Responsibilities

Communication

Patient Empowerment

Cultural competency

Ethics & Professional Conduct

Education, Prevention & Health Promotion

Psychosocial Support Services / Assessment

Barriers to Care / Health Disparities

Community Resources

Outreach

Care Coordination

Advocacy
ONS competencies for nurse navigators

2017 Oncology Nurse Navigator Core Competencies

- Coordination of care
- Communication
- Education
- Professional role
- Expert ONN

(ONS, 2017)
Expert review and broad endorsement

- Extent to which competency represents essential function for cancer patient navigators in a wide variety of settings (3 pt scale)
- Extent to which competency is clearly written to facilitate consistent interpretation and implementation across practice settings (3 pt scale)
- Endorsement for inclusion (Y/N)
- Open-text field for feedback

(Pratt-Chapman, Willis & Masselink, 2015)
<table>
<thead>
<tr>
<th>Domain</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient care</td>
<td>6</td>
</tr>
<tr>
<td>Knowledge for practice</td>
<td>6</td>
</tr>
<tr>
<td>Practice-based learning</td>
<td>7</td>
</tr>
<tr>
<td>Interpersonal and communication skills</td>
<td>8</td>
</tr>
<tr>
<td>Systems-based practice</td>
<td>3</td>
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<tr>
<td>Professionalism</td>
<td>8</td>
</tr>
<tr>
<td>Interprofessional collaboration</td>
<td>3</td>
</tr>
<tr>
<td>Personal and professional development</td>
<td>4</td>
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(Pratt-Chapman, Willis & Masselink, 2015)
Patient Care

Domain 1: Patient Care
Facilitate patient-centered care that is compassionate, appropriate, and effective for the treatment of cancer and the promotion of health.

1.1 Assist patients in accessing cancer care and navigating healthcare systems. Assess barriers to care and engage patients and families in creating potential solutions to financial, practical, and social challenges.

1.2 Identify appropriate and credible resources responsive to patient needs (practical, social, physical, emotional, spiritual), taking into consideration reading level, health literacy, culture, language, and amount of information desired. For physical concerns, emotional needs, or clinical information, refer to licensed clinicians.

1.3 Educate patients and caregivers on the multidisciplinary nature of cancer treatment, the roles of team members, and what to expect from the healthcare system. Provide patients and caregivers evidence-based information and refer to clinical staff to answer questions about clinical information, treatment choices, and potential outcomes.

1.4 Empower patients to communicate their preferences and priorities for treatment to their healthcare team; facilitate shared decision-making in the patient’s healthcare.

1.5 Empower patients to participate in their wellness by providing self-management and health-promotion resources and referrals.

1.6 Follow up with patients to support adherence to agreed-upon treatment plan through continued nonclinical barrier assessment and referrals to supportive resources in collaboration with the clinical team.

(Pratt-Chapman et al., 2015)
Knowledge for practice

Domain 2: Knowledge for Practice
Demonstrate basic understanding of cancer, healthcare systems, and how patients access care and services across the cancer continuum to support and assist patients.
NOTE: This domain refers to foundational knowledge applied across other domains.

2.1 Demonstrate basic knowledge of medical and cancer terminology.
2.2 Demonstrate familiarity with and know how to access and reference evidence-based information regarding cancer screening, diagnosis, treatment, and survivorship.
2.3 Demonstrate basic knowledge of cancer, cancer treatment, and supportive care options, including risks and benefits of clinical trials and integrative therapies.
2.4 Demonstrate basic knowledge of health system operations.
2.5 Identify potential physical, psychological, social, and spiritual impacts of cancer and its treatment.
2.6 Demonstrate general understanding of healthcare payment structure, financing, and where to refer patients for answers regarding insurance coverage and financial assistance.

(Pratt-Chapman et al., 2015)
## Practice-based learning & improvement

### Domain 3: Practice-Based Learning and Improvement

Improve patient navigation process through continual self-evaluation and quality improvement. Promote and advance the profession.

- **3.1 Contribute to patient navigation program development, implementation, and evaluation.**
- **3.2 Use evaluation data (barriers to care, patient encounters, resource provision, population health disparities data, and quality indicators) to collaboratively improve navigation process and participate in quality improvement.**
- **3.3 Incorporate feedback on performance to improve daily work.**
- **3.4 Use information technology to maximize efficiency of patient navigator’s time.**
- **3.5 Continually identify, analyze, and use new knowledge to mitigate barriers to care.**
- **3.6 Maintain comprehensive, timely, and legible records capturing ongoing patient barriers, patient interactions, barrier resolution, and other evaluation metrics, and report data to show value to administrators and funders.**
- **3.7 Promote navigation role, responsibilities, and value to patients, providers, and the larger community.**

(Pratt-Chapman et al., 2015)
## Practice-based learning & improvement

### Domain 4: Interpersonal and Communication Skills
Demonstrate interpersonal and communication skills that result in the effective exchange of information and collaboration with patients, their families, and health professionals.

- **4.1** Assess patient capacity to self-advocate; help patients optimize time with their doctors and treatment team (e.g., prioritize questions, clarify information with treatment team).
- **4.2** Communicate effectively with patients, families, and the public to build trusting relationships across a broad range of socioeconomic and cultural backgrounds.
- **4.3** Employ active listening and remain solutions-oriented in interactions with patients, families, and members of the healthcare team.
- **4.4** Encourage active communication between patients/families and healthcare providers to optimize patient outcomes.
- **4.5** Communicate effectively with navigator colleagues, health professionals, and health-related agencies to promote patient navigation services and leverage community resources to assist patients.
- **4.6** Demonstrate empathy, integrity, honesty, and compassion in difficult conversations.
- **4.7** Know and support National Standards for Culturally and Linguistically Appropriate Services (CLAS) in Health and Health Care to advance health equity, improve quality, and reduce health disparities.
- **4.8** Apply insight and understanding about emotions and human responses to emotions to create and maintain positive interpersonal interactions.

(Pratt-Chapman et al., 2015)
Domain 5: Professionalism
Demonstrate a commitment to carrying out professional responsibilities and an adherence to ethical principles.

5.1 Apply knowledge of the difference in roles between clinically licensed and nonlicensed professionals and act within professional boundaries.
5.2 Build trust by being accessible, accurate, supportive, and acting within scope of practice.
5.3 Use organization, time management, problem-solving, and critical thinking to assist patients efficiently and effectively.
5.4 Demonstrate responsiveness to patient needs within scope of practice and professional boundaries.
5.5 Know and support patient rights.
5.6 Demonstrate sensitivity and responsiveness to a diverse patient population, including but not limited to diversity in gender, age, culture, race, religion, abilities, and sexual orientation.
5.7 Demonstrate a commitment to ethical principles pertaining to confidentiality, informed consent, business practices, and compliance with relevant laws, policies, and regulations (e.g., HIPAA, agency abuse reporting rules, Duty to Warn, safety contracting).
5.8 Perform administrative duties accurately and efficiently.

(Pratt-Chapman et al., 2015)
Domain 6: Systems-Based Practice
Demonstrate an awareness of and responsiveness to the larger context and system of healthcare, as well as the ability to call effectively on other resources in the system to provide optimal healthcare.

6.1 Support a smooth transition of patients across screening, diagnosis, active treatment, survivorship, and/or end-of-life care, working with the patient’s clinical care team.
6.2 Advocate for quality patient care and optimal patient care systems.
6.3 Organize and prioritize resources to optimize access to care across the cancer continuum for the most vulnerable patients.

Domain 7: Interprofessional Collaboration
Demonstrate ability to engage in an interprofessional team in a manner that optimizes safe, effective patient- and population-centered care.

7.1 Work with other health professionals to establish and maintain a climate of mutual respect, dignity, diversity, ethical integrity, and trust.
7.2 Use knowledge of one’s role and the roles of other health professionals to appropriately assess and address the needs of patients and populations served to optimize health and wellness.
7.3 Participate in interprofessional teams to provide patient- and population-centered care that is safe, timely, efficient, effective, and equitable.

(Pratt-Chapman et al., 2015)
## Personal & professional development

**Domain 8: Personal and Professional Development**
Demonstrate qualities required to sustain lifelong personal and professional growth.

<table>
<thead>
<tr>
<th>8.1 Set learning and improvement goals. Identify and perform learning activities that address one’s gaps in knowledge, skills, attitudes, and abilities.</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.2 Demonstrate healthy coping mechanisms to respond to stress; employ self-care strategies.</td>
</tr>
<tr>
<td>8.3 Manage possible and actual conflicts between personal and professional responsibilities.</td>
</tr>
<tr>
<td>8.4 Recognize that ambiguity is part of patient care and respond by utilizing appropriate resources in dealing with uncertainty.</td>
</tr>
</tbody>
</table>

(Pratt-Chapman et al., 2015)
Some differences between PNs and NNs

Applies knowledge of clinical guidelines (e.g., National Comprehensive Cancer Network, American Joint Committee on Cancer) and specialty resources (e.g., ONS Putting Evidence into Practice resources) throughout the cancer continuum.

Promotes lifelong learning and evidence based practice to improve the care of patients with a past, current, or potential diagnosis of cancer.

Demonstrates effective communication with peers, members of the multidisciplinary healthcare team, and community organizations and resources.

Contributes to the delivery of evidence-based care using current and appropriate professional standards of practice.

Provides education on genomic and molecular testing and the implication of the results.

Participates in the tracking and monitoring of metrics and outcomes, in collaboration with administration, to document and evaluate outcomes of the navigation program and report findings to the cancer committee.

Provides and reinforces education to patients, families, and caregivers about diagnosis, treatment options, side effect management, and post-treatment care and survivorship (e.g., survivorship care plan, treatment summary).

In collaboration with other members of the healthcare team, builds partnerships with local agencies and groups that may assist with cancer patient care, support, or educational needs.

Establishes and maintains professional role boundaries with patients, caregivers, and the multidisciplinary care team in collaboration with manager, as defined by job description.

(ONS, 2017)
Application: Oncology PN Training

- An overview of patient navigation and core competencies
- The basics of health care
- The basics of patient navigation
- Enhancing communication
- Professionalism
- Enhancing practice

Ideal For: Oncology Patient Navigators without a clinical license (sometimes called “lay navigators”)
## Professional certificate programs - online

<table>
<thead>
<tr>
<th>Program</th>
<th>Audience</th>
<th>Cost</th>
<th>Curriculum</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cancer Navigator Program</td>
<td>Social workers, counselors, navigators, support staff</td>
<td>$550</td>
<td>Cancer biology, prevention, screening, treatment, palliative care, financial resources, advocacy, insurance</td>
</tr>
<tr>
<td>Cancer Navigator Program</td>
<td>Registered Nurses</td>
<td>$550</td>
<td>All of the above + symptom management</td>
</tr>
<tr>
<td>GW Cancer Center Oncology Patient Navigator Training: The Fundamentals</td>
<td>Any navigator role</td>
<td>Free</td>
<td>Core competencies, health care, PN role, communication, professionalism, navigation in practice</td>
</tr>
<tr>
<td>GW Cancer Center Executive Training</td>
<td>Program leaders</td>
<td>Free</td>
<td>Identifying need; planning your program: models, components, tools, goals; Funding; Evaluation</td>
</tr>
</tbody>
</table>

(Pratt-Chapman & Burhansstipanov, 2017)
## Professional certificate programs - live

<table>
<thead>
<tr>
<th>Program</th>
<th>Audience</th>
<th>Cost</th>
<th>Curriculum</th>
</tr>
</thead>
<tbody>
<tr>
<td>Harold P. Freeman Navigation Institute Patient Navigation Program</td>
<td>Patient Navigators</td>
<td>$995</td>
<td>Not publicly available</td>
</tr>
<tr>
<td>Misericordia University</td>
<td>Patient navigators</td>
<td>Based on tuition</td>
<td>Justice, hospitality; physical, emotional &amp; social support; communication; interviewing</td>
</tr>
<tr>
<td>Native Patient Navigator’s Training</td>
<td>Patient navigators</td>
<td>$1,100</td>
<td>AIAN history, cultural competency, outreach, education, communication, collaboration, resources, tumor types, clinical trials, triable IRBs</td>
</tr>
<tr>
<td>Otero</td>
<td>Patient navigators</td>
<td>Based on tuition</td>
<td>Linking patients with services; information and resources; provider-patient interaction; health promotion; behavior change</td>
</tr>
</tbody>
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(Pratt-Chapman & Burhansstipanov, 2017)
## Professional certificate programs - live

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</thead>
<tbody>
<tr>
<td>PN Training Collaborative</td>
<td>Varies</td>
<td>Varies</td>
<td>Resources, health promotion, professional conduct, motivational interviewing</td>
</tr>
<tr>
<td>Shenandoah U./Inova Health</td>
<td>Registered nurses</td>
<td>$3,000</td>
<td>Navigating complex health care services; Care coordination within new healthcare models</td>
</tr>
<tr>
<td>Smith Center PN Training in Integrative Cancer Care</td>
<td>Navigators interested in integrative care</td>
<td>$995</td>
<td>Yoga; client assessment; communication; spiritual support; nutrition; building trust; planning your integrative practice</td>
</tr>
<tr>
<td>University of Miami</td>
<td>Any navigator or patient advocate</td>
<td>$4,995</td>
<td>Health advocacy; patient illness; communication; ethics; health law; healthcare financing</td>
</tr>
</tbody>
</table>

(Pratt-Chapman & Burhansstipanov, 2017)
## Certification

<table>
<thead>
<tr>
<th>Academy of Oncology Nurse &amp; Patient Navigators (examination)</th>
<th>National Accreditation Program for Breast Centers (examination)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oncology Patient Navigator – Certified Generalist</td>
<td>Certified Navigator – Breast Imaging</td>
</tr>
<tr>
<td>Oncology Nurse Navigator – Certified Generalist</td>
<td>Certified Navigator – Management/ Social Worker</td>
</tr>
<tr>
<td></td>
<td>Certified Navigator – Advocate</td>
</tr>
<tr>
<td></td>
<td>Certified Navigator – Provider</td>
</tr>
<tr>
<td></td>
<td>Certified Navigator – Nurse</td>
</tr>
</tbody>
</table>

(Pratt-Chapman & Burhansstipanov, 2017)
Evaluation: AONN+ metrics

• Coordination of Care/ Care Transitions
• Research/ Quality/ Performance Improvement
• Operations Management/ Organizational Development/ Healthcare Economics
• Community Outreach & Prevention
• Professional Roles & Responsibilities
• Psychosocial Support Services/ Assessment
• Patient Advocacy/ Patient Empowerment
• Survivorship/ End of Life

(AONN, 2017)
Evaluation: PN-BOT

PN-BOT was created by the GW Cancer Center and made possible through a grant from Genentech. Access at: https://smhs.gwu.edu/gwci/BarriersTool

(PN-BOT™ is an Excel workbook composed of 22 sheets that serve five main purposes:

- **MISCELLANEOUS SHEETS FOR NAVIGATION, USABILITY AND FUNCTIONALITY**
  - Home
  - Set Up
  - Reports List
  - Reference
  - Don’t Delete

- **DATA ENTRY SHEETS FOR DATA ENTRY, MODIFICATION AND LOOKUP**
  - Patient Data Entry
  - Case Data Entry
  - Encounters Data Entry
  - Testimonials Data Entry

- **LIST SHEETS FOR RAW DATA/DATABASE STORAGE**
  - Patient List
  - Case List
  - Encounters List
  - Barriers List
  - Testimonials List

- **REPORTS SHEETS FOR AUTOMATIC REPORT TEMPLATES**
  - Patient Reports
  - Case Reports
  - Encounter Reports
  - Barriers Reports

- **PIVOT SHEETS FOR CUSTOM PIVOT TABLE REPORTS**
  - Patient Pivot
  - Case Pivot
  - Encounters Pivot
  - Barriers Pivot

(GW Cancer Center, 2016)
Evaluation: PN-BOT

Patient Navigation Barriers and Outcomes Tool™ (PN-BOT™)
Version 1.1 Quick Start Guide

How-To Videos

- Brief Orientation Video
- Transferring Data from Version 1.0 to Version 1.1
- Don't Lose Your Data! 3 Important Types of "Saves" to Know About
- How to Add a New Patient to PN-BOT™
- How to Enter and Track Information About Encounters, Barriers and Navigator Actions
- How to Document a Patient Testimonial
- How to Use the Patient Selection Interface and Look Up Previously Entered Information
- How to Remind Yourself of Patient Follow Up
- How to Document Information for Patients with Recurrences or More than One Case
- How to Create Your Own Custom Variables
- How to Use PN-BOT™’s Automatic Reports
- Understanding and Using ID Numbers in PN-BOT™
- Data Entry Color Meanings in PN-BOT™
- Archived Webinar: Maximizing PN-BOT™ for Current Users

September 2016

GW Cancer Center, 2016
Resources

Advancing the Field of Cancer Patient Navigation:
A Toolkit for Comprehensive Cancer Control Professionals

January 2016

Implementing the Commission on Cancer Standard 3.1
Patient Navigation Process
A Road Map for Comprehensive Cancer Control Professionals and
Cancer Program Administrators

September 2017

(GW Cancer Center, 2016; GW Cancer Center, 2017)
Implementation considerations
Critical Implementation Factors

- Addresses a need
- Role clarity
- Adequate resources
- Effective communication
- Clear operational processes and supports
- Culture of quality improvement

(Valaitis et al, 2017)
Addresses Need

- Who are your patients? What are their needs?
- What are the gaps in healthcare services?
- Where are the bottlenecks in healthcare system?
- What are the longest delays?
- Do services match patient needs?
- How will the program impact service providers?
- What problem are you trying to solve?
Patient Flow Considerations

**Screening**
- How long does it take for patients to get test results? What are the biggest barriers?

**Diagnosis**
- How long does it take to get to diagnosis? When do PN meet patients? What support or info do patients need at diagnosis?

**Treatment**
- How long does it take for patients to start treatment? How many miss appointments and why? What administrative barriers do they face?

**Post-Treatment**
- Who helps transition the patient to survivorship? What informational needs do patients have? What resources are available?
Role clarity

- What do you want to the navigator to do?
- What do you NOT want the navigator to do?
- How will the navigator work with other health care team members?

**Warning:** Do not hire a navigator to try to fix the wrong problem. They cannot fix an inefficient and underresourced system.
Adequate resources

- What ongoing professional development and training will the navigators have?
- What supervision support will they have?
- Do you have the financial, space and technological infrastructure to support the navigator?
- Are there sufficient resources for the navigator to refer patients to?
  - Community based organizations
  - Oncology specialists
  - Other specialists
Effective communication

• How will the navigators obtain access to patients?
• How will navigators communicate with internal and external colleagues?
• How will the navigators communicate with payers regarding coverage and reimbursement challenges?
• Do supervisors have the time to appropriately support and troubleshoot challenges that navigators identify that are impeding patient access to and adherence to care?
Clear operational processes & supports

• Who will supervise the navigator?
• What protocols, policies and procedures will be in place?
• How can problem resolution be streamlined?
• Create care maps for common problems!
Culture of quality improvement

• How will you evaluate the program?
• How will you use evaluation findings?
• Who will champion system improvements if a gap is identified by the navigator?
• How can you make the system simpler for patients?
• How can you take the burden off patients?
• How can you increase information sharing across the healthcare team?
References


Thank you!

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Follow us on Twitter: @GWCaner
www.gwcancercenter.org

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Sign-up for the GW Cancer Center’s Cancer Control Technical Assistance E-Newsletter: bit.ly/TAPenews