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Workforce competencies in patient navigation

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GW Cancer Center

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Cancer Center

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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

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Patient Navigation Competencies



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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

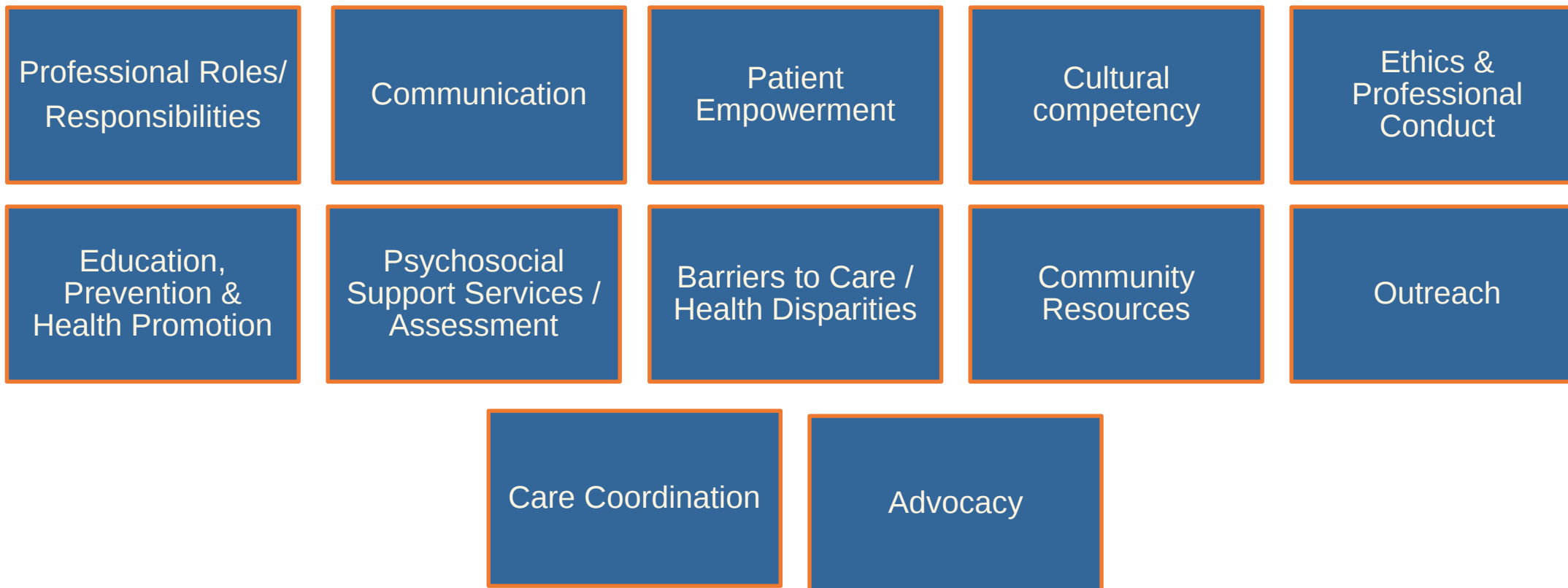
National
Association of
Social Workers

Association of
Oncology Social
Workers

Association of
Community
Cancer Centers

Patient
navigators and
CHWs

Roles and responsibilities



ONS competencies for nurse navigators

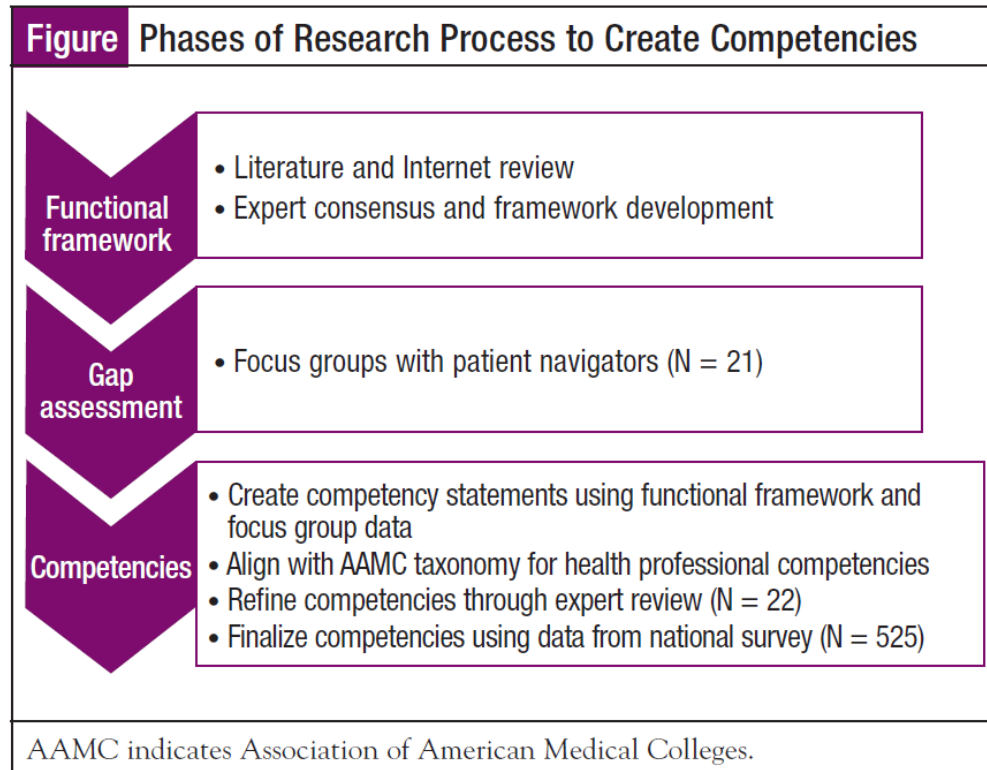


2017 Oncology Nurse Navigator Core Competencies

- 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)

GW Cancer Center PN competency domains

Domain
Patient care (6)
Knowledge for practice (6)
Practice-based learning (7)
Interpersonal and communication skills (8)
Systems-based practice (3)
Professionalism (8)
Interprofessional collaboration (3)
Personal and professional development (4)

(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.

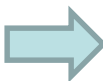
2.6 Demonstrate general understanding of healthcare payment structure, financing, and where to refer patients for answers regarding insurance coverage and financial assistance.

(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.

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- 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 (eg, 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)

Professionalism

Domain 5: Professionalism

Demonstrate a commitment to carrying out professional responsibilities and an adherence to ethical principles.

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- 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 (eg, HIPAA, agency abuse reporting rules, Duty to Warn, safety contracting).
 - 5.8 Perform administrative duties accurately and efficiently.

(Pratt-Chapman et al., 2015)

Systems-based Practice & Interprofessional Collaboration

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.

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

(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

Contribute

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

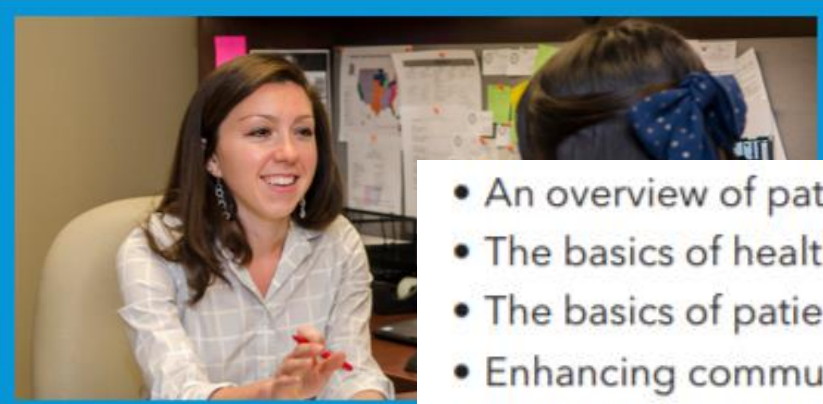
Establishes and maintains professional role boundaries with patients, caregivers, and the multidisciplinary care team in collaboration with manager, as defined by job description.

(ONS, 2017)

Application: Oncology PN Training

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Oncology Patient Navigator Training: *The Fundamentals*



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

An Online Training for Patient Navigators Available
Based on the Core Competencies for Oncology Patient Navigators

Ideal For:

Oncology Patient Navigators without a clinical license (sometimes called "lay navigators")

(GW Cancer Center, 2015)

Professional certificate programs - online

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

(Pratt-Chapman & Burhansstipanov, 2017)

Professional certificate programs - live

Program	Audience	Cost	Curriculum
Harold P. Freeman Navigation Institute Patient Navigation Program	Patient Navigators	\$995	Not publicly available
Misericordia University	Patient navigators	Based on tuition	Justice, hospitality; physical, emotional & social support; communication; interviewing
Native Patient Navigator's Training		\$1,100	AIAN history, cultural competency, outreach, education, communication, collaboration, resources, tumor types, clinical trials, triable IRBs
Otero	Patient navigators	Based on tuition	Linking patients with services; information and resources; provider-patient interaction; health promotion; behavior change

(Pratt-Chapman & Burhansstipanov, 2017)

Professional certificate programs - live

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

(Pratt-Chapman & Burhansstipanov, 2017)

Certification

Academy of Oncology Nurse & Patient Navigators (examination)	National Accreditation Program for Breast Centers (examination)
Oncology Patient Navigator – Certified Generalist	Certified Navigator – Breast Imaging
Oncology Nurse Navigator – Certified Generalist	Certified Navigator – Management/ Social Worker
	Certified Navigator – Advocate
	Certified Navigator – Provider
	Certified Navigator – Nurse

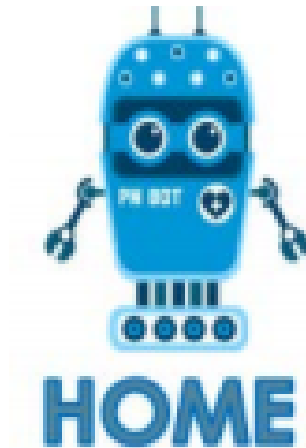
(Pratt-Chapman & Burhansstipanov, 2017)

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

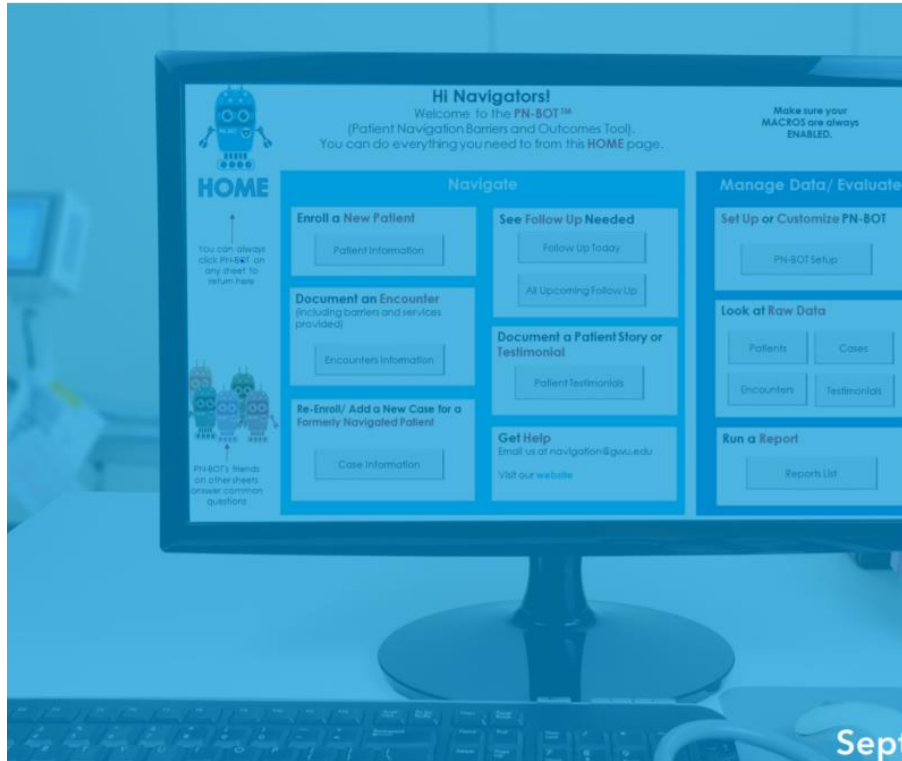
PIVOT SHEETS FOR CUSTOM PIVOT TABLE REPORTS

- 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



Implementing the Commission on Cancer Standard 3.1 Patient Navigation Process

*A Road Map for Comprehensive Cancer Control Professionals and
Cancer Program Administrators*



(GW Cancer Center, 2016; GW Cancer Center, 2017)

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Implementation considerations



Cancer Center

Critical Implementation Factors

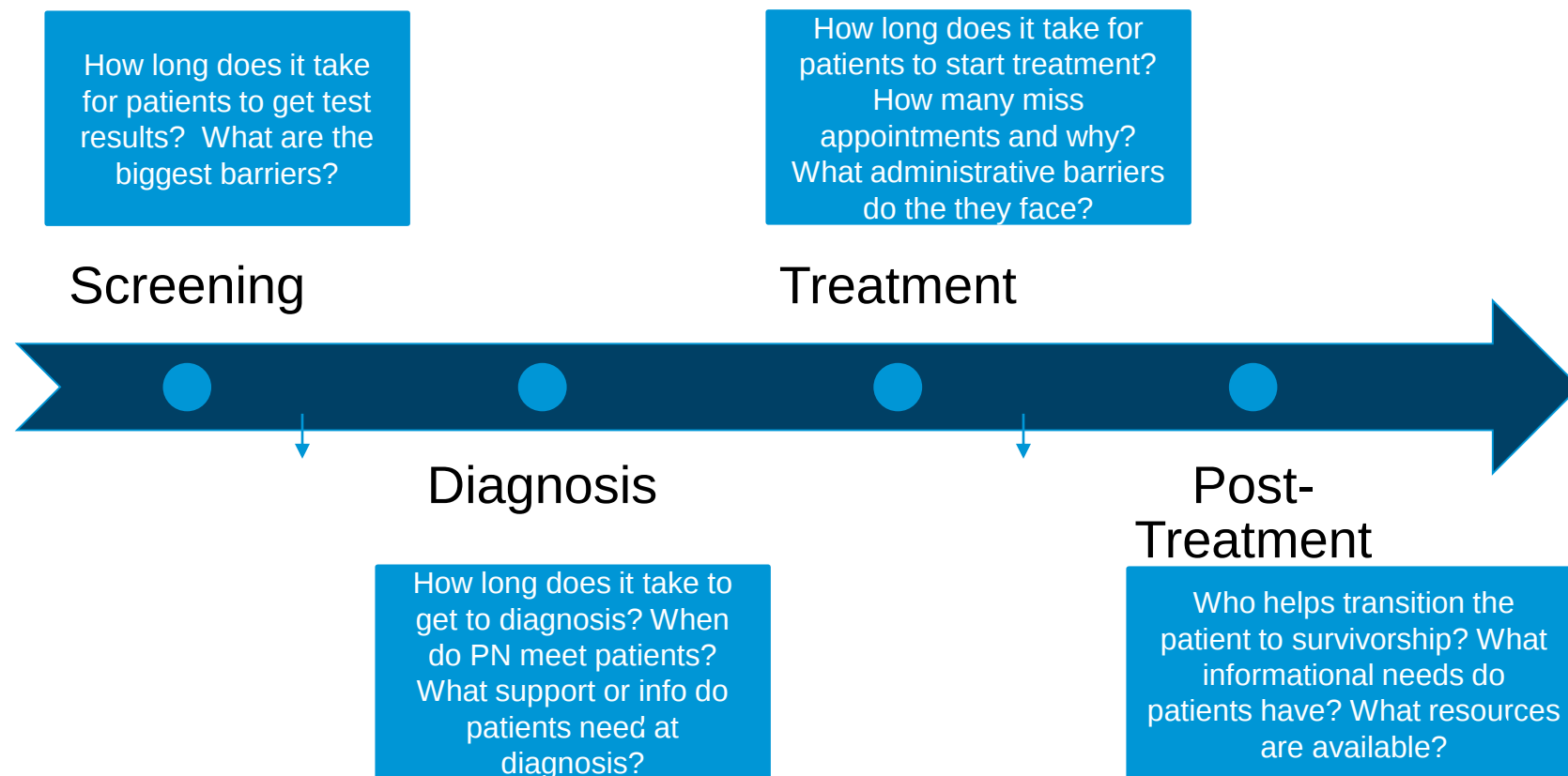
- Addresses a need
- Role clarity
- Adequate resources
- Effective communication
- Clear operational processes and supports
- Culture of quality improvement

(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



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?

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Thank you!

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