

Emerging Field of Patient Navigation

Welcome to the Patient Navigation World

Patient Navigation is a challenging healthcare career path. Recently, I experienced this role as my injured spouse dealt with a broken wrist and foot, limited mobility, denial of services from an insurance company, excessive prescription costs, and conflicting treatment plans (we had to go to two different physicians for treatment of the wrist and foot). Although I have had many experiences working healthcare issues with friends and family, these recent challenges made me think – “I wish I had a competent patient navigator to help with this morass.”

Healthcare is moving to a patient-centered, evidence-based approach but it will need the help of patient navigators, advocates, and community health workers to get there. A disjointed medical care system desperately needs the skills of these professionals.

Defining Patient Navigation

Simply put, patient navigation is having a “mom.” As a patient, I am in a poor position to handle all the challenges that arise during my treatment. I just can’t take in all the noise and only hear part of the message. I am directed to do things to improve my health status but I don’t hear the whole message. I am too busy sorting out what I know and what I imagine. Despite being focused on improving my health, there are too many distractions. My emotional state confuses my rational state.

In season one of the TV series “Breaking Bad” a high school chemistry teacher is diagnosed by his physician as having cancer. As the oncologist begins to explain potential treatment options, all the patient hears (and the viewer) is “Cancer – blah, blah, blah, blah...”

The challenge facing healthcare professionals is to reach patients and help them make good decisions about their care and long-term health. It is very difficult to do this when the brain runs away with its fears and concerns. In an effective healthcare environment, Patient Navigators are the trained professionals who bridge the gap between what is said and what is actually understood. Whatever their gender identity, they are the “moms” who make things right by

assuming some of the responsibilities you, the patient, are temporarily unable to handle. Patient Navigators (PN) are health consultants who speaks the patient's language, makes sense of the messages, and acts to both protect and grow the patient's coping skills.

Introduction

One challenge in healthcare is identifying responsibilities. In a multi-discipline environment, it is essential that all involved understand their own roles and those of other care providers. This summary document is meant to define the duties and responsibilities of patient navigators. It includes expected personal capabilities and attributes of those who serve as patient navigators and their roles within the healthcare system. Although other duties and expectations may be assigned by a particular healthcare facility or system, the following are the expectations of all patient navigators as defined by the Patient Centered Education and Research Institute.

Attributes

An effective patient navigator displays the following attributes:

- Compassionate and patient-focused
- Strong emotional intelligence
- High ethical professional standards
- Excellent communication skills
- Understands healthcare facilities and processes
- Organized and attentive to detail
- Follows through with tasks and responsibilities
- Shows intellectual curiosity and seeks verification evidence
- Works well with teams.

Patient navigators are healthcare professionals who focus on patients' needs and help guide them through the healthcare system. They remove obstacles that prevent patients from receiving optimal care and treatment.

Scope of Practice

A Patient Navigator's **Scope of Practice** and expectations as defined by the Patient Centered Education and Research Institute include the following:

- Serve as the voice of the patient within healthcare settings and in transitional care.
- Ensure cultural sensitivity toward a patient's origin, gender identity, race or ethnic identity, socioeconomic status, and religion.
- Arrange interpretive language services when needed.
- Address caregiver/family and patient concerns.
- Facilitate communication between the patient, family members, and healthcare providers to ensure patient satisfaction and quality of care.
- Organize patient schedules and manage appointments to ensure timely services.
- Help patients and caregivers understand health condition diagnoses, needs, treatments, and social/emotional impacts.
- Educate patients on their rights and assist them in participating in care decisions.
- Recognize and report unusual issues that arise during treatment that may impact outcomes.
- Help patients understand costs, deal with insurance issues, and access available financial assistance for their care.
- Collect data on patient/caregiver experiences and outcomes.
- Work effectively with internal and community resources to improve patient care.
- Ensure continuation of care and links to community resources.
- Arrange/ensure transportation to post-release appointments.
- Help establish access to needed prescription and assistive devices.
- Function well with health care teams and other medical providers.

Performing as a patient navigator will vary based on the organization and specialty area in which they work. Some of the common activities of patient navigators involve making appointments and coordinating health care activities, helping patients identify needs and linking them to appropriate resources and health care personnel, educating patients about their care, and fostering patient understanding of treatment options.

A patient navigator may be involved with outside entities as well. A patient might need related legal counsel, home health care, transportation, or specialty care outside a hospital setting. Patient navigators collaborate with external organizations and personnel to ensure the needs of the patient are met.

The patient navigator may work in any healthcare setting. Common settings are in a hospital or in a physician's practice. Some are independent contractors and have their own navigation or advocate business and work directly for patients. Patient navigators may specialize in disciplines such as oncology, pediatrics, or diabetic care. Patient navigators work closely with health care providers and institutions – but most of all with patients and their family/caregivers.

Sample Job Description for a Patient Navigator

The following is a job description recently posted for a patient navigator. Although there are sometimes major differences, this is typical of what most patient navigators will see.

- Manages the patient experience and works with designated areas, departments and staff to improve patient experience as evidenced by patient experience scores;
- Collaborates with Unit Managers to identify opportunities to improve patient experience in patient care areas;
- Interprets and explains to patients and their families the philosophy, policies and procedures of the hospital within 24 hours of patient's admission to hospital and reviews "Patient's Rights" materials at this time;
- Assists in referring patients to appropriate services and resources and responds personally when other alternatives are not available;
- Identifies and assesses problems that may arise, investigates and directs inquires and complaints to appropriate hospital staff members;
- Communicates with medical staff and physicians directly and promptly when an issue or complaint arises regarding hospital care;
- Assists administration in establishing policies, objectives and quality of these policies; policies include interpretive services and policies regarding religious preferences issues;
- Encourages understanding and adherence by both staff and patients to the hospital philosophy, rights and responsibilities;
- Enhances professional growth and development through participation in educational programs, current literature, in-service and workshops;

Education and Training

There are primarily two types of patient navigators – **Lay Navigators** and **Nurse Navigators**. Currently, there is not a specific education or background requirement to work as a patient navigator and different healthcare providers often have their own standards. National competency standards have been implemented by the Patient Centered Education and Research Institute. **Persons desiring to be a Certified Professional Patient Navigator (CPPN) must pass a national competency exam, adhere to high ethical standards, show good emotional intelligence, and provide evidence of patient navigation experiences.** Completion of a Patient Navigation/Advocate education program is not a requirement but will help them complete the CPPN process by teaching competencies and providing experiences.

Lay Navigators are persons from a variety of academic backgrounds (GED to PhD) who have a desire to help other people effectively use health care resources. Their primary qualification is a desire to help patients. These navigators are non-clinical in that they do not have a state license to provide health care and cannot do clinical tasks in a healthcare setting. Some facilities will employ patient navigators based solely on their experience in the healthcare sector with on-the-job training.

Social workers also perform as patient navigators. A licensed social worker will have a minimum Bachelor's degree in social work and maintain state licensure. Because of their licensed status, they may have broader duties than a Lay Navigator but are generally classified as non-clinical or lay navigators and have the same competency assurance requirements to be a CPPN.

Nurse Navigators require a minimum of an associate's degree for state licensure and are under emerging requirements to have a BSN degree (Bachelor's of Science in Nursing). They must also complete a qualifying nursing exam (NCLEX). To become a fully recognized Nurse Navigator, they may have additional requirements for certifications in such areas as oncology, gerontology, diabetes, and other fields as a required certification on their clinical license. To become a CPPN, they must follow the same process as lay navigators.

Education programs in patient navigation are emerging throughout the United States. Under the title of Patient Advocate or Patient Navigator, various academic programs ranging from one week to four years are emerging. Online opportunities to gain patient navigation skills are available through a growing list of institutions. One program, George Washington University's

Cancer Institute offers a free twenty-hour online preparation program for lay navigators in oncology that closely mirrors the competencies for the CPPN designation. Other academic programs are under review by the Patient Centered Education and Research Institute for designation as a preferred education provider.

Below is a listing of other programs that offer Patient Navigation and Advocacy education. This list is compiled by the *Alliance of Professional Health Advocates* and is not affiliated with the Patient Centered Education and Resource Institute. To discover further information about this list, visit their website at <http://healthadvocateprograms.com/>.

- **Alfus Patient Advocacy Certificate Program**
The University of Miami offers this online program that provides a wide range of training and activities ranging from communications skills, to ethics, to financing healthcare and marketing.
- **Assumption College (Worcester, MA) Graduate or Certificate Program**
Graduate level program leads to either a masters degree or post-bachelors certificate in health advocacy. This is an online program.
- **University of Arizona College of Nursing - RN Patient Advocates**
Experienced clinical RNs can participate in this learning intensive to become independent RN Patient Advocates.
- **UC Berkeley Extension Health Advocacy Program**
This program is designed for those who may be working in health-related fields, as well as those who are interested in working in those fields. Its coursework covers a range of topics from the health insurance industry, to the continuum of options for patients, plus health policy and ethics.
- **Boston University Master of Science in Health Communication**
If your interests are in health policy, journalism or other communications focused advocacy, this degree may be of interest.
- **Cleveland State University**
This is a program for advocates already employed in a hospital setting, developed in conjunction with the American Hospital Association.
- The **Colorado School of Public Health and Denver Health** offer the [Patient Navigator Training Collaborative](#) for hospital navigators and some specialized training.
- **CSA - Certified Senior Advisors**
Through a comprehensive educational program, SCSA (Society of Certified Senior Advisors) helps professionals understand the key health, social and financial issues that are important to the majority of seniors.
- **The Graduate Institute** offers a certificate in Integrative Health Coaching and Patient Navigation working toward health coach credentialing via the ICF, integrative medicine.
- **Harold P. Freeman Patient Navigation Institute**
The first patient navigation program developed in the United States, this institute

has developed a curriculum for those interested in working as navigators for hospitals and community organizations.

- **Healthcare Liaison** developed the first advocacy program specializing in training already medically-trained professionals. They use video conferencing for all training. Small groups, individualized programming.
- **Hospital Patient Advocacy Certificate Program**
Is offered entirely online by Dorland and Access International.
- The **Integrative Medical Clinic Foundation** offers the **Imagine You® Leader Certificate Program** for patient empowerment.
- **University of Illinois at Chicago** offers two innovative, interdisciplinary completely online programs. Join nationally renowned patient safety authorities as you earn a master's degree in Patient Safety Leadership or a graduate certificate in Patient Safety, Error Science and Full Disclosure at nationally ranked University of Illinois at Chicago's College of Medicine.
- **NAHAC - National Association of Health Advocacy Consultants**
NAHAC is a professional organization for consumers, professionals and those involved in policy and legislative aspects of healthcare/patient advocacy and navigation.
- **The National Institute of Whole Health** offers a **Patient Health Advocacy Program** which focuses patient health education and advocacy, as well as business skills that can be applied in all healthcare, medical care, patient services and private patient care environments.
- The **Patient Best** program offers a 12 to 15 week program of online instruction ranging from care coordination to ethics and business practices for those who wish to develop an independent advocacy practice.
- **Professional Patient Advocate Institute**
offered by Dorland and Access International provides an online learning experience which culminates in a certificate.
- **Sarah Lawrence College**
offers the longest-standing (graduate) patient advocacy degree program in the US. Graduates work in all aspects of health and patient advocacy, according to their interests. In addition, they offer a **certificate in Mediation in Healthcare**.
- **Smith Center for Healing and the Arts**
Patient Navigation Training with an integrative focus.
- **Sonoma State University (California)**
This program in Patient Advocacy and Navigation provides a special emphasis on Integrative Health Care.
- **Southern Vermont College**
offers a both a bachelors degree and a certificate program in Healthcare Management and Advocacy.
- **Stanford University**
offers a Patient Advocacy program, as a clinical program to afford its medical students the experience of working in community clinics.
- **UCLA Extension Certificate Program in Patient Advocacy**
helps students acquire the necessary knowledge and skills needed to excel in

this rewarding career playing a vital role in the evolving health care system. Complete this certificate in as little as 1 year, or take up to 3 years.

- **Utica College (NY)**
Online Certificate Program in Health Care Advocacy (HCAN) covers a variety of courses leading to many different advocacy career paths
- **WASHAA - The Washington State Health Advocacy Association** focuses on raising awareness of health advocacy, teach health advocacy skills, connect patients to WA state health advocacy resources.
- **Whatcom Community College (Washington State)**
Patient Advocacy and Navigation Program This six-month course takes place in Bellingham, WA and includes field experience.

Next Steps

The following chapters provide additional information pertaining to health care. They provide insight into the healthcare system in the United States. A variety of sources have been used for this compilation through Jones Bartlett Learning so the tone and writing will vary based on the authors. Each chapter delves further into the various knowledges that successful patient navigators need to have in their repertoire. Specific topics covered here are:

- **Overview of Healthcare Delivery**
- **Managed Care**
- **Public Health's Role in Health Care**
- **Healthcare Financing**
- **Information Technology Impact on Healthcare**
- **Healthcare Law**
- **Healthcare Ethics**
- **Community Mental Health**
- **Healthcare Terminology**
- **Medical Abbreviations**
- **Glossary of Medical Terms**
- **Glossary of Medications**
- **Glossary of Diagnostic Tests and Procedures**
- **PCERI Code of Ethics**
- **PCERI Competencies**

This compilation provides a great summary but only real world exposure to patient navigation will truly prepare anyone for this important profession.