

# What Does a Patient Navigator Do?

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Patient navigation core competencies,  
training & certification



**D**o you feel like your cancer program is scrambling to meet the American College of Surgeons' Commission on Cancer (CoC) Patient Navigation standards? If so, you are not alone. The CoC accredits approximately 1,500 cancer programs, and these institutions provide more than 70 percent of cancer care for newly-diagnosed patients in the U.S.<sup>1</sup> In 2012 the CoC issued three new continuum of care standards to be phased in by accredited cancer programs by 2015: Standard 3.1 (Patient Navigation Process), Standard 3.2 (Psychosocial Distress Screening), and Standard 3.3 (Survivorship Care Plan).<sup>2</sup>

This article describes resources that can help your cancer program keep pace with new patient navigation standards, raise the caliber of your patient navigation services, and protect your cancer program from potential legal liabilities.

### **A Growing & Evolving Field**

Patient navigation is a rapidly growing and evolving healthcare profession—from Dr. Harold Freeman's groundbreaking patient navigation study<sup>3</sup> to the new CoC standards discussed above. While the need for patient navigation has never been greater, the role of the patient navigator and scope of practice has been ill-defined until now. Patient navigation programs have proliferated quickly with no clear standards.<sup>4</sup> A large, unregulated workforce poses obvious legal risks to patient navigators and the organizations that employ them. To support professional development and scope of practice standards for the newest member of the multidisciplinary cancer care team, the George Washington University (GW) Cancer Institute developed national, consensus-based core competencies for oncology patient navigators (sometimes called "lay navigators") and a corresponding online training module to equip oncology patient navigators with the foundational knowledge and skills necessary to perform their role effectively and efficiently.

### **Oncology Patient Navigator Core Competencies**

GW developed these core competencies with input from a steering committee that included representation from the Academy of

Oncology Nurse & Patient Navigators (AONN+), the Association of Community Cancer Centers (ACCC), the Association of Oncology Social Work (AOSW), the National Association of Social Workers (NASW), and the Oncology Nursing Society (ONS). The steering committee also included patient navigators from three cancer programs and community health workers (CHWs) from two community-based organizations from a variety of geographic locations across the U.S.

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Competencies were reviewed by 22 national experts and endorsed by 525 patient navigators, nurse navigators, navigation supervisors, navigation trainers, and navigation researchers through a 272-question survey.<sup>4</sup>

Core competencies are important for healthcare professions to define the basic knowledge, skills, and abilities for a particular profession. Our research resulted in a total of 45 core competency statements that align with the Association of American Medical Colleges' health professions taxonomy<sup>5</sup> and distinguish the oncology role of patient navigators from their nurse navigator and CHW counterparts. The core competencies are provided in Table 1, pages 56-58. For additional information on how patient navigators differ from CHWs and nurse navigators, see prior research from the GW Cancer Institute by Willis et al.<sup>6</sup>

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**Table 1. Oncology Patient Navigator Core Competencies**

<p><b>DOMAIN 1. PATIENT CARE</b>  Facilitate patient-centered care that is compassionate, appropriate, and effective for the treatment of cancer and the promotion of health.</p>	
<p><b>1.1.</b> Assist patients in accessing cancer care and navigating health-care systems. Assess barriers to care and engage patients and families in creating potential solutions to financial, practical, and social challenges.</p>	<p><b>1.4.</b> Empower patients to communicate their preferences and priorities for treatment to their healthcare team; facilitate shared decision making in the patients' healthcare.</p>
<p><b>1.2.</b> 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.</p>	<p><b>1.5.</b> Empower patients to participate in their wellness by providing self-management and health promotion resources and referrals.</p>
<p><b>1.3.</b> 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.</p>	<p><b>1.6.</b> Follow up with patients to support adherence to agreed-upon treatment plan through continued non-clinical barrier assessment and referrals to supportive resources in collaboration with the clinical team.</p>
<p><b>DOMAIN 2. KNOWLEDGE FOR PRACTICE</b>  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.)</p>	
<p><b>2.1.</b> Demonstrate basic knowledge of medical and cancer terminology.</p>	<p><b>2.4.</b> Demonstrate basic knowledge of health system operations.</p>
<p><b>2.2.</b> Demonstrate familiarity with and know how to access and reference evidence-based information regarding cancer screening, diagnosis, treatment, and survivorship.</p>	<p><b>2.5</b> Identify potential physical, psychological, social, and spiritual impacts of cancer and its treatment.</p>
<p><b>2.3.</b> Demonstrate basic knowledge of cancer, cancer treatment, and supportive care options, including risks and benefits of clinical trials and integrative therapies.</p>	<p><b>2.6</b> Demonstrate general understanding of healthcare payment structure, financing, and where to refer patients for answers regarding insurance coverage, and financial assistance.</p>
<p><b>DOMAIN 3. PRACTICE-BASED LEARNING AND IMPROVEMENT</b>  Improve patient navigation process through continual self-evaluation and quality improvement. Promote and advance the profession.</p>	
<p><b>3.1.</b> Contribute to patient navigation program development, implementation, and evaluation.</p>	<p><b>3.5.</b> Continually identify, analyze, and use new knowledge to mitigate barriers to care.</p>
<p><b>3.2.</b> 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.</p>	<p><b>3.6.</b> 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.</p>
<p><b>3.3.</b> Incorporate feedback on performance to improve daily work.</p>	<p><b>3.7.</b> Promote navigation role, responsibilities, and value to patients, providers, and the larger community.</p>
<p><b>3.4.</b> Use information technology to maximize efficiency of patient navigator's time.</p>	

**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 healthcare professionals.

<b>4.1.</b> 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).	<b>4.5.</b> Communicate effectively with navigator colleagues, health-care professionals, and health-related agencies to promote patient navigation services and leverage community resources to assist patients.
<b>4.2.</b> Communicate effectively with patients, families, and the public to build trusting relationships across a broad range of socioeconomic and cultural backgrounds.	<b>4.6.</b> Demonstrate empathy, integrity, honesty, and compassion in difficult conversations.
<b>4.3.</b> Employ active listening and remain solutions-oriented in interactions with patients, families, and members of the healthcare team.	<b>4.7.</b> 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.
<b>4.4.</b> Encourage active communication between patients and/or families and healthcare providers to optimize patient outcomes.	<b>4.8.</b> Apply insight and understanding about emotions and human responses to emotions to create and maintain positive interpersonal interactions.

**DOMAIN 5. PROFESSIONALISM**

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

<b>5.1.</b> Apply knowledge of the difference in roles between clinically licensed and non-licensed professionals and act within professional boundaries.	<b>5.5.</b> Know and support patient rights.
<b>5.2.</b> Build trust by being accessible, accurate, supportive, and acting within scope of practice.	<b>5.6.</b> 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.
<b>5.3.</b> Use organization, time management, problem-solving, and critical thinking to assist patients efficiently and effectively.	<b>5.7.</b> 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).
<b>5.4.</b> Demonstrate responsiveness to patient needs within scope of practice and professional boundaries.	<b>5.8.</b> Perform administrative duties accurately and efficiently.

**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.

<b>6.1.</b> 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.	<b>6.3.</b> Organize and prioritize resources to optimize access to care across the cancer continuum for the most vulnerable patients.
<b>6.2.</b> Advocate for quality patient care and optimal patient care systems.	

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<b>DOMAIN 7. INTERPROFESSIONAL COLLABORATION</b> Demonstrate ability to engage in an interprofessional team in a manner that optimizes safe, effective patient- and population-centered care.	
<b>7.1.</b> Work with other healthcare professionals to establish and maintain a climate of mutual respect, dignity, diversity, ethical integrity, and trust.	<b>7.3.</b> Participate in interprofessional teams to provide patient- and population-centered care that is safe, timely, efficient, effective, and equitable.
<b>7.2.</b> Use knowledge of one's role and the roles of other healthcare professionals to appropriately assess and address the needs of patients and populations served to optimize health and wellness.	
<b>DOMAIN 8. PERSONAL AND PROFESSIONAL DEVELOPMENT</b> Demonstrate qualities required to sustain lifelong personal and professional growth.	
<b>8.1.</b> Set learning and improvement goals; identify and perform learning activities that address one's gaps in knowledge, skills, attitudes, and abilities.	<b>8.3.</b> Manage possible and actual conflicts between personal and professional responsibilities.
<b>8.2.</b> Demonstrate healthy coping mechanisms to respond to stress; employ self-care strategies.	<b>8.4.</b> Recognize that ambiguity is part of patient care and respond by utilizing appropriate resources in dealing with uncertainty.

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### Oncology Patient Navigator Training

The GW Cancer Institute developed the Oncology Patient Navigator Training structured around these 45 core competencies to prepare oncology patient navigators with the knowledge and skills to do their job. The Oncology Patient Navigator Training is the first comprehensive course on patient navigation fundamentals using consensus-based competencies provided for free online (see Table 2, right).

The training content covers general information including:

- The history of patient navigation
- Basic medical terminology
- Cancer basics
- The impact of cancer
- The U.S. healthcare system and financing
- Key skills of the oncology patient navigator, including patient assessment, identifying resources, communication, advocacy, and cultural competency.

Finally, the training also discusses ethics, scope of practice, and the importance of ongoing professional development, and quality improvement.

Oncology Patient Navigation Training will help prepare oncol-

ogy patient navigators for national certification as an Oncology Patient Navigator-Certified Generalist (OPN-CG) through the Academy of Oncology Nurse & Patient Navigators (AONN+), beginning in 2016. To qualify for certification, oncology patient navigators will need to take a proctored examination to demonstrate core competencies, fulfill an experiential requirement, and maintain membership in their professional organization, AONN+. The examination will be beta tested in May 2016 at the AONN+ East Coast Regional Meeting in New Orleans, La., The inaugural certification examination will be held at the 2016 AONN+ annual meeting in Las Vegas.

### Additional Resources to Improve Capacity for the New CoC Standards

In summer 2013, the CoC conducted a survey to assess readiness of member organizations to implement the new patient-centered standards. Based on survey results, the CoC determined that Standards 3.1 (patient navigation) and 3.2 (psychosocial distress screening) were required to be implemented by January 1, 2015, as originally planned.<sup>7</sup> However, the CoC revised the Survivorship Care Plan requirement (Standard 3.3) to allow for phase-in between 2015 and 2019.<sup>8</sup> All of these standards have proved challenging for cancer programs who are being asked to provide

most of these services with little to no reimbursement from payers. Additional resources created by the GW Cancer Institute to help cancer programs meet these CoC standards (Figure 1, page 60) include:

- **The Executive Training on Navigation and Survivorship.** This training walks you through the nuts and bolts of patient-centered program development and includes brief interactive presentations; supplemental written content that summarizes the latest research; and best practices, case studies, and customizable activities to create a program plan for your institution. Eight free continuing education (CE) hours are available for physicians and nurses. Access the Executive Training on Navigation and Survivorship online at [tinyurl.com/GWOnlineAcademy](http://tinyurl.com/GWOnlineAcademy).
- **The Cancer Survivorship e-Learning Series.** This free continuing education program educates clinicians to care for cancer survivors. Developed through the National Cancer Survivorship Resource Center, a collaboration between the American Cancer Society (ACS) and the GW Cancer Institute and funded by the Centers for Disease Control and Prevention (CDC), the series was originally intended to improve longitudinal care for cancer survivors in a primary care setting. However, oncology clinicians who participated in the program have demonstrated significant knowledge change. Currently, the series encompasses nine modules that educate clinicians on a wide variety of topics, including physical and psychosocial impacts of cancer treatment, the importance of health promotion and care coordination, and specific guidelines for prostate, colorectal, and breast cancer survivorship. Head and neck guidelines for survivorship care are coming in the spring of 2016. Access the e-learning series at [cancersurvivorshipcentereducation.org](http://cancersurvivorshipcentereducation.org).
- **Archived webinars.** This free series covers topics relevant to best practices and new approaches or tools in patient navigation, survivorship, and distress screening. The series can be accessed through the education section of the [gwcancerinstitute.org](http://gwcancerinstitute.org) home page.

### Future Implications

Given the reach of CoC-accredited programs, these new patient-centered standards are poised to have a significant impact on the way that cancer care is delivered in the U.S. The Oncology Patient Navigator Core Competencies and the Oncology Patient Navigator Training are critical resources to ensure that patient navigators are performing their role efficiently and effectively. Certification from AONN+ for Oncology Patient Navigators – Certified Generalists will document that patient navigators understand functions within their scope of practice. Furthermore, core competencies, standardized training, and certification will support sustainability by setting expectations regarding the

**Table 2. Patient Navigation Training Modules & Lessons**

#### MODULE 1. Welcome & Introduction

- Welcome letter and video
- Training overview
- Acknowledgements
- Frequently asked questions (FAQS)

#### MODULE 2. Overview of Patient Navigation & the Oncology Patient Navigator Training

- An overview of patient navigation and competencies

#### MODULE 3. The Basics of Healthcare

- Medical terminology
- Cancer basics
- Clinical trials
- Impact of cancer
- U.S. healthcare system
- Healthcare payment financing

#### MODULE 4. The Basics of Patient Navigation

- The role of the patient navigator
- Navigating patients
- Shared decision-making
- Identifying resources

#### MODULE 5. Enhancing Communication

- Communicating with patients
- Patient advocacy
- Culturally competent communication

#### MODULE 6. Professionalism

- Scope of practice
- Ethics and Patient Rights

#### MODULE 7. Enhancing Practice

- Practicing efficiently and effectively
- Healthcare team collaboration
- Program evaluation and quality improvement
- Personal and professional development

**Figure 1. Additional GW Cancer Institute Navigation & Survivorship Resources**



duties of the role for payers and, potentially, fulfilling a portion of the care coordination requirements for new value-based payment structures. 

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