



GUIDE 3: NAVIGATOR TRAINING

ARC: Access to Resources in the Community/Accès aux Ressources Communautaires

Guide 2: Navigation Training

Goal of Training

The primary goal of the ARC Patient Navigator training is for Navigators to develop the knowledge, skills and abilities to support primary care patients to overcome barriers to accessing community health and social resources.

Learning Objectives

Upon completion of the training program, the Navigator will be able to:

1. Describe the scope of the Patient Navigator role in primary care.
2. Apply knowledge and skills in cultural humility and health literacy to develop a trusting navigator-patient relationship and address health disparities.
3. Demonstrate effective and collaborative communication skills with the primary care team, patients and community resources to optimize navigation services.
4. Know how to help patients identify priorities related to their health and social needs and develop an action plan to reach community resources to address these needs.
5. Identify common social barriers to utilize community health and social resources and describe strategies to overcome barriers to access.
6. Describe methods to assist patients in self-management and self-advocacy to access primary health care.
7. Identify and appraise available community health and social resources and programs to ensure that they are appropriate and relevant for patients' needs and priorities.
8. Document navigation activities and gather data in a timely and accurate manner.

Training Process

Navigators have to complete 13 modules in chronological order as listed in the table below. Each module contains study material such as PPT, Video recordings, handouts, peer reviewed articles and additional learning resources. Module 1 – Part C, 2, 3, and 4-7 require completing online sessions.

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Modules		Study Material
1	Patient Navigation in Primary Health Care	
	Part A: Introduction to the ARC	<ul style="list-style-type: none"> • PPT (Part A and Part B) • ARC Navigation Process Guide and Toolkit • External training link [1] (Part C) • FM Compensation (pdf) • Journal Articles (pdf) • Additional learning resources (links)
	Part B: Primary Healthcare system in Ontario	
	Part C: Patient navigator roles and responsibilities	
2	Patient navigation and health disparities	<ul style="list-style-type: none"> • External training link - Colorado [1] • Journal Articles (pdf) • Additional learning resources (links)
3	Language, Health and Active Offer	<ul style="list-style-type: none"> • External training link - CNFS [2] • Video recording and PPT (Ms. Katrine Sauvé-Schenk) • Additional learning resources (links)
4	Introduction to Chronic Disease; Protective and Risk Factors	<ul style="list-style-type: none"> • External training link - Colorado [3] • Journal Articles (pdf) • Additional learning resources (links)
5	Preventive Healthcare 101: Helping Clients with Lifestyle Change	
6	Motivational Interviewing	<ul style="list-style-type: none"> • External training link – BMJ [4] • Video recording and handouts (Dr. Monica Brewer) • Journal Articles (pdf) • Additional learning resources (links)
7	Culture, A Social Determinant of Health	<ul style="list-style-type: none"> • Video recording and handouts (Dr. Salma Debs-Ivall) • Journal Articles (pdf) • Additional learning resources
8	Advocacy and Empowerment	<ul style="list-style-type: none"> • Video recording and PPT (Ms. Vela Tedic)
9	Navigation from the Field	<ul style="list-style-type: none"> • PPT (Somerset west CHC Multicultural Health Navigators) • MNH experience handout
10	Health and Safety/Navigation Self-care	<ul style="list-style-type: none"> • Handouts
11	Searching for Community Resources	<ul style="list-style-type: none"> • PPT (Champlain Healthline)
12	Person-centered care and Navigation	<ul style="list-style-type: none"> • PPT • Journal article
	Activity - Case studies and role play	<ul style="list-style-type: none"> • Case studies and role play handouts

A description of the modules is given below:

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Module 1: Patient Navigation in Primary Care

The Patient Navigator works with primary care practices to help patients experiencing social barriers reach and use community health and social resources (e.g., healthy eating, physical activity, mental health or parenting support programs). In the ARC Social Prescribing (SP) model, the Navigator actively offers services in French for the Francophone population, and provides information, practical assistance, social support, and advocacy to help people overcome barriers. The Navigator serves as a link between patients, primary and community care by acting as an informational channel and champion for patients. This module covers the following themes:

- ✓ Introduction to ARC Social prescribing model
- ✓ Patient Navigator roles and responsibilities
- ✓ Developing effective patient relationships
- ✓ Staying within professional boundaries: What should patient navigators not do?

Study material - (Click Module 1)

- ✚ Introduction to ARC (PPT)
- ✚ Principles of Navigation
- ✚ ARC Navigation Process Guide and toolkit (See Guide 2- Navigation Process)
- ✚ Ontario Health Care system (PPT)
- ✚ Family Medicine Compensation Practice (Handout)
- ✚ Patient Navigator Roles and Responsibilities – Complete online training available from the Patient Navigator Training Collaborative. See weblink [1]
- ✚ ARC Navigator Roles Competencies and Training
- ✚ Navigator Do's and Don'ts
- ✚ Journal Articles



Activity: The journal articles mentioned above will provide you with an understanding of patient navigation roles, activities, and outcomes for different patient populations served, in various health care settings. As you read through the articles, please keep in mind, and respond to the following questions:

- 1) How would you define patient navigation?
- 2) What are the unique elements of the Patient Navigator role with primary care patients compared to individuals with chronic conditions such as cancer or diabetes?
- 3) Which of the core navigation roles are you most comfortable fulfilling? What roles do you need to learn more about?
- 4) What are the activities or services that lie outside your scope of practice as a Patient Navigator?
- 5) What do you need to know to be successful in working as part of a primary care team?

Additional External Learning Resources for Module 1

- [Patients First Action Plan for Health Care](#)
- [Navigation Principles](#)
- [Navigation Services - English/ Navigation Services - French](#)
- [Primary Health Care in Canada: Highlights from CIHI's 2016 Primary Health Care Chartbook and Future Directions](#) . Co-hosted by Canadian Institute for Health Information (CIHI) and Chronic Disease Prevention Alliance of Canada (CDPAC)

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Module 2: Patient Navigation and Health Disparities

The module explores the following topics:

- ✓ Patient Navigation and Health Disparities
- ✓ History of patient navigation
- ✓ Barriers to health care including socioeconomic, emotional, language, culture, and the health care system
- ✓ Patient navigation's role in decreasing health disparities
- ✓ Definitions and models of patient navigation

Study material

- ✚ Patient Navigation and Health Disparities – Complete online training available from the Patient Navigator Training Collaborative. See weblink [1]
- ✚ Journal Articles ([Click Module 2](#))

Additional External Learning Resources for Module 2

- [Public Health Agency of Canada: What determines health?](#)
- [What makes Canadians healthy or unhealthy?](#)
- [Mikkonen, J., & Raphael, D. \(2010\). Social Determinants of Health: The Canadian Facts. Toronto: York University School of Health Policy and Management](#)

Module 3: Language, Health and Active Offer

This module examines language and health, and how to integrate the Active Offer of French Language in patient navigation. Characteristics of working in minority settings and cultural competence are also discussed.

Study material

- ✚ Toolbox for the Active Offer – Complete online training available from Active Offer Hub, Consortium National de Formation En Sante (CNFS). See Weblink [2] In this training complete the following themes:
 - Active offer (go to: Homepage>Teach>Theme Directory)
 - Language, health, equity and safety (go to: Homepage>Teach>Theme Directory)
 - Leadership (go to: Homepage>Teach>Theme Directory)
 - Working in a minority community (go to: Homepage>Teach>Theme Directory)
 - Issues and challenges of Active Offer (go to: Homepage>Teach>Resources)
 - Patient-centered approach (go to: Homepage>Teach>Resources)
 - Cultural competence (go to: Homepage>Teach>Resources)
- ✚ Active Offer (Video Recording and PPT in [Click Module 3](#))

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Additional External Learning Resources for Module 3

- [Leadership and characteristics of working in minority setting](#)
- [Active Offer for Employees](#)
- [Active Offer for Employers](#)
- [Cadre de référence pour la formation à l'offre active des services de santé en français](#), Lortie L, Lalonde A. J. Consortium national de formation en santé, January 2012 (French)
- [Reference Framework - Training for Active Offer of French-Language Health Services](#), Lortie L, Lalonde A. J. Consortium national de formation en santé, July 2012 (English)
- [Practical Guide for the Active Offer of French-language Services in the Ontario Government](#), Office of Francophone Affairs, 2008
- [The Impact of Language Barriers on Patient Safety and Quality of Care](#). Bowen, S. Société Santé en Français (SSF), 2015
- [Recommandations du Réseau - Collecte des données linguistiques](#), Réseau des services de santé en français de l'Est de l'Ontario, 2016
- Rapport special- L'offre active de services en français: la clé de voûte à l'atteinte des objectifs de la loi sur les services en français de l'Ontario, Commissaire aux services en français de l'Ontario, 2016
 - [Complete report](#)
 - [Summarized report](#)

*In Module 4, 5 and 6 you will learn about preventive healthcare, staying healthy and risk factors that may cause chronic diseases. The information provided in these modules will help the Navigators to understand why chronic diseases affect groups or populations differently and how various resources in the community could help their patients.

Note: Navigator only enables patient's access to these community resources. The navigator does not provide any counselling or advise to the patients.

Module 4: Introduction to Chronic Disease and Protective and Risk Factors

Part 1. This first part of the module reviews the following chronic diseases:

- ✓ Heart disease
- ✓ Cancer
- ✓ Diabetes
- ✓ Chronic Obstructive Pulmonary Disease (COPD)
- ✓ Mental illness

Part 2. The second part of this module builds the knowledge base about protective factors to keep us healthy and risk factors that increase the chance of getting a chronic disease.

- ✓ Risk factors are related to physical activity, nutrition, body weight, blood pressure, cholesterol, smoking and tobacco use, alcohol, and drug abuse.

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- ✓ Protective factors include exercise, healthy eating, weight management, blood pressure and cholesterol; mental health and social connections.

Study material

- ✚ Part 1. Introduction to Chronic Diseases – Complete online training available from the Patient Navigator Training Collaborative. See weblink [3] (go to: eLearning courses> Browse course catalogue> Introduction to Chronic Disease)
- ✚ Part 2. Protective and Risk Factors - Complete online training available from the Patient Navigator Training Collaborative. See weblink [3] (go to: Homepage>Courses>eLearning courses> Browse course catalogue> Preventive Healthcare 101: Protective and Risk Factors)
- ✚ It is recommended to review the Canadian Mental Health Association's [brochures](#) on mental health issues before beginning the above module.
- ✚ Journal Articles (Click Module 4)

Additional External Learning Resources for Module 4

A. Mental Health

- [eMental Health Website](#)
- [Mental Health Resource Guide](#), Ottawa Public Health
- [Public Health Resource list](#), Ottawa Public Health

B. Introduction to chronic diseases

- [Free Online Self-Management Workshop](#), [The Online Chronic Disease Self-Management Program](#)
- [Chronic Disease Prevention Alliance of Canada \(CDPAC\)](#)
- Public Health Agency of Canada, [Common risk factors, influence by social and physical conditions, are driving this chronic disease challenge](#).
- Chronic Disease Alliance of Canada, [Chronic Diseases in Canada](#).
- [Diabetes Canada](#)
- [The Lung Association of Canada](#)
- [Heart and Stroke Foundation of Canada](#)
- [Canadian Cancer Society](#)

Module 5 Preventive Healthcare 101: Helping Clients with Lifestyle Change

This module explores unhealthy lifestyle habits such as smoking, poor nutrition or lack of physical activity, and how these increase our risk for disease. Patients often require knowledge about these risk factors, and support in making lifestyle changes to reduce the risk of chronic disease and manage their health. There are 3 themes in this module:

- ✓ Stages of Change
- ✓ Motivational Interviewing (also discussed in-depth in Module 7)
- ✓ Goal setting

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Study material

- ✚ Helping Clients with Lifestyle Change – Complete online training available from the Patient Navigator Training Collaborative. See weblink [3]
(go to: Homepage>Courses>eLearning courses> Browse course catalogue> Preventive Healthcare 101: Helping Clients with Lifestyle Change)
- ✚ Journal Articles (Click Module 5)

Additional External Learning Resources for Module 6

- [What is Patient Empowerment?ENOPE video](#)
- [A greater Understanding – How to be an Advocate. A Patient Advocate Foundation \(2009\) How-To-Be-An-Advocate.pdf \(patientadvocate.org\)](#)
- [Top 10 Steps to Successful Goals , Project Smart, \(2010\)](#)
- [The Health Foundation Inspiring Improvement, Practitioner Development Programme - Handout 2: Goal setting and action planning.](#)
- [Professional Quality of Life Scale \(PROQOL\) - Compassion Satisfaction and Compassion Fatigue score sheet, Version 5 \(2009\)](#)

Module 6: Motivational Interviewing

This module examines Motivational Interviewing (MI) as a patient navigation approach. MI is “a collaborative, person-centered form of guiding to elicit and strengthen motivation for change”. The principles of MI stem from the field of Cognitive Behavioural Therapy, with the goal of helping to facilitate change by guiding individuals through the process of determining their own personal motivations for change. It is a technique that promotes an individual’s self-efficacy and autonomy by allowing the individual to choose the goals that are important to them, and their own personal benefits involved in attaining these goals. A Navigator uses MI in helping patients to identify their priorities, barriers or challenges to access community health and social resources, and an action plan to support their access.

Study material - (Click Module 6)

- ✚ Motivational Interviewing – Complete online training available from BMJ. See weblink [4].
For instructions on how to sign up for BMJ module see Appendix BMJ Login
- ✚ Motivational Interviewing (Video Recording and Handouts)
- ✚ Journal Articles

Additional External Learning Resources for Module 7

- [A Definition of Motivational Interviewing.](#)
- [Motivational Interviewing: Preparing People to Change Health Behaviors. Tips Sheet. The Mid-Atlantic Addiction Technology Transfer Center. Motivational Interviewing Web site \(motivationalinterview.org\)](#)
- [University of Bradford, Academic Skills Advice service, 10 Takeaway Tips - Effective Communication in Group Work](#)

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Module 7: Culture: A Social Determinant of Health

This module explores cultural competence, defined as a set of “congruent behaviors, attitudes, and policies that come together in a system, agency, or among professionals that enables the system or professionals to work effectively in cross-cultural situations” (Cross et al., 1989). The presentation by Dr. Salma Debs-Ivall for this module links to topics covered in the Patient-Centred Approach and Cultural Competence theme in Module 3: Language, Health and Active Offer.

Study material- (Click Module 7)

- ✚ Cultural Competency (Video Recording and Handout)
- ✚ Journal Articles

Additional External Learning Resources for Module 8

- Nestel, S. [Colour Coded Health Care - The impact of race and racism on Canadians' Health](#). Wellesley Institute. (Full Report)
- Nestel, S. [Colour Coded Health Care - The impact of race and racism on Canadians' Health](#). Wellesley Institute. (Summary of Report)
- Tawara, D. [Promoting Cultural and Linguistic Competency - Self-Assessment checklist for Personnel Providing Primary Health Care Services](#) (2009)

Module 8: Advocacy and Empowerment

This module explores how an integrated advocacy and empowerment approach can be used in patient navigation.

Study material - (Click Module 8)

- ✚ Advocacy and Empowerment (Video Recording)
- ✚ Advocacy and Empowerment (PPT)

Module 9: Navigation from the Field

This module focusses on authentic practice including stories from experienced Multicultural Health Navigators about their experience working with vulnerable patients, activities to support patient access to primary health care, and how to identify relevant and appropriate community resources.

Study material - (Click Module 9)

- ✚ Learning from Multicultural Health Navigators (MHNs): See PPT
- ✚ MNH experience (Handout)

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Module 10: Health and Safety/ Navigator Self-care

Navigators are responsible for confidentiality of patient information and should never disclose patient personal and health information. If patient seems have any social or health need or be in mental health crisis, the navigator should inform the primary care provider immediately. In case of medical emergencies during the in-person meeting call 911.

Self-care for Navigators

This module defines compassion fatigue (CF), burnout, vicarious trauma (VT) and moral distress; and the warning signs and preventative measures to ensure self-care and wellness for Navigators.

Study material

- ✚ Navigation Self Care (Click Module 10)

Module 11: Searching for Community Resources

The Champlainhealthline.ca provides a website directory of health services and community resources, with different ways of searching information including by keyword, topic (e.g., healthy aging, mental health), health care options (e.g., community agencies, health care professions, public health), and location of service. The website serves the Champlain region, including Renfrew County; Ottawa; the Eastern Counties; North Lanark and North Grenville. This tutorial walks you through searching for some practical examples of resources that you may encounter in your navigation role with primary care patients.

Study material

- ✚ Champlain Healthline Tutorial (PPT – Click Module 11)
- ✚ Champlain website - Health Services for Champlain - champlainhealthline.ca

Module 12: Person-centered Care and Navigation

This module describes the evolution of person-centred approaches in health care and how to implement this in the Navigator-Patient encounter.


Study material (Click Module 12)

- ✚ Person-centred Care and Navigation (PPT)
- ✚ Journal articles

Activity: Case Studies and Role Plays

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The case studies and role plays provide an opportunity for the Navigator to practice using ARC Navigation toolkit (ARC Referral Form, Patient Summary and Planning Sheet, Navigator Log), and practice researching and identifying appropriate community resources (CR) for a patient. This module can be over a few days to allow the Navigator time to research CR based on patient needs, priorities and other findings from the initial role play. This is followed by a brief role play in which the Navigator shares the CR they have identified with the patient.

 **Activity:** Four case studies are provided (See Appendix Module 14). For each case study review the case, use the ARC navigation toolkit to plan and perform CR searches. Role plays can be performed with peer navigators or practice staff.

Professional Development

Mentorship

Mentorship is integral to the Navigator's ongoing professional development and self-care. The mentorship meetings provide an opportunity for navigators to debrief their mentors about their navigation experience, queries or challenges, identify harmful impact of navigation roles and engage in self-care. Navigators can identify their managers or a clinical individual as their mentor.

Ongoing Learning

Navigators can join Social Prescribing and Navigation networks for peer-to-peer support, share resources, participate in ongoing education activities. Examples of SP network:

1. [Canadian Institute for Social Prescribing](#)
2. [Social Prescribing Communities of Practice | Alliance for Healthier Communities \(allianceon.org\)](#)

Weblinks for Online Training

1. <http://patientnavigatortraining.org> Colorado Patient Navigator Training Collaborative
2. [Toolbox for the Active Offer Videos](#), Consortium national de formation en santé (CNFS)
3. <http://patientnavigatortraining.org/courses/elearning-courses/> Colorado Patient Navigator Training Collaborative
4. [Log in \(bmj.com\)](#) - BMJ Publishing Group Limited (see Appendix BMJ for Login Instructions)