

## Access to Resources in the Community (ARC) Navigator Roles, Competencies, and Training

A Patient Navigator is an individual who supports and guides patients in overcoming barriers to access community based primary health care resources. Patient navigation has been conceptualized as a person-centred approach to empower individuals, promote patient engagement, and address health disparities. Common responsibilities of a Patient Navigator include offering psychosocial support, arranging transportation, providing assistance in completing forms, obtaining information on financial resources, arranging appointments, and linking to community resources (Ferrante et al., 2010; Meade et al., 2014; Wang et al., 2015).

The goal of the ARC study is to optimize equitable access to community health and social resources (CR) for primary care patients experiencing social challenges, including Franco-Ontarians living in minority situations.

The ARC Patient Navigator works with primary care practices to help patients experiencing social barriers reach and use resources such as healthy eating, physical activity programs, mental health, parenting support, financial assistance, and chronic disease management. The Patient Navigator actively offers services in French for the Francophone population, and provides information, practical assistance, social support, and advocacy to help patients access needed resources for their health and well-being. The Navigator facilitates information continuity among patients, primary and community care through established communication strategies.

**Goal of training:** The primary goal of the ARC Navigator training program is for participants to develop the knowledge, skills and abilities to work with primary care practices and patients to support individuals experiencing social barriers reach community health and social resources.

### There are 6 Navigation roles:

1. Navigator (integrating role)
2. Communicator
3. Collaborator
4. Advocate
5. Educator
6. Professional

The **Navigator** role defines the non-clinical scope of practice of the Patient Navigator and incorporates the abilities of the other 5 roles.

**Competencies** define the applied abilities including behaviours, skills and knowledge that are required by people to successfully perform the job.

### Competency Framework and Training Content

The training content addresses the following three domains of learning: knowledge, skill, and affect (e.g. emotions, attitudes).

<b>Role</b>	<b>Key Competencies</b>	<b>Enabling Competencies</b>	<b>Training Content <sup>1</sup></b>	<b>Assessment of Learning</b>
Navigator	1. Provide services within the defined scope and role of the ARC Navigator.	1.1 Demonstrate commitment to person-centred care. 1.2 Engage patients in setting priorities and develop a plan to enable access to programs recommended by primary care provider [PCP] for their health. 1.3 Identify barriers affecting patients' access to community health and social resources (CR) and develop an action plan with the patient to address barriers. 1.4 Provide assistance, support, encouragement, and/or accompaniment to help patients reach CR 1.5 Follow up with patients to determine outcomes related to CR	-Overview of navigator roles, responsibilities, and core competencies (see: Navigation Process Guide) -Person-centred goal-setting -Common social barriers to accessing CR for diverse patient populations -Navigator boundaries: how to address issues related to the limits of the navigator role, when to refer to primary care provider (PCP) or other health professional or service -Navigation experiences from the field -Identification of community resources (211, Champlain Healthline, Northeast Healthline; Ottawa Public Health) -Documentation of CR according to defined categories e.g. healthy living, financial support, chronic disease management -Language, Health and the Active Offer	***Bi-weekly Navigator Reflection Guide, for each role.  Participants' self-assessment of their knowledge, skills, and confidence pre and post-training re: navigator scope, roles and responsibilities.  Online Module 1: Quiz: "Is this a patient navigator duty?"  Online Module 1: Discussion Board Questions  Satisfaction with training (overall assessment)  Session Facilitator assessment of case studies role play e.g. Does the Navigator demonstrate ability to help patient identify goals and priorities; determine social barriers, identify and select relevant CR.

<sup>1</sup>*Applicable to all enabling competencies within the role category*

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Navigator	2. Identify and appraise community resources/programs to address patients' goals and priorities.	2.1 Research appropriate CR responsive to patients' needs; connect patients to CR  2.2 Refer and connect patients to French language resources when available.	See above	
	3. Demonstrate professional behaviors and ethical conduct, respect for diversity, honesty and maintenance of confidentiality.	3.1 Demonstrate sensitivity in working with underserved populations.  3.2 Apply knowledge of patient confidentiality and privacy.		
Communicator	1. Demonstrate effective interpersonal skills and communication skills with PC team, patients and community program staff.	1.1 Demonstrate empathy, respect, honesty, and compassion in communication.  1.2 Establish rapport and trusting relationships with patients.  1.3 Demonstrate linguistic sensitivity and communicate in patients' language of choice.  1.4. Communicate social support, provide guidance and information, to help patients manage their health and access CR.	-Language, health and the Active Offer -Motivational Interviewing (MI) and effective communication strategies to identify patient's health concerns, priorities, barriers, and a plan to reduce barriers -Person-centred communication -Types of social support within navigator scope: emotional (expressing care/concern, reassurance); empowerment, identification of support in patients' network (family); provision of information and instrumental support (e.g. accompaniment to CR)	Online Module 3: Discussion Board Questions.  Active Offer Case Study.

Role	Key Competencies	Enabling Competencies	Training Content	Assessment of Learning
Communicator	2. Demonstrate knowledge of health literacy and cultural humility.	2.1 Communicate with patients at an appropriate literacy level.  2.2 Apply cultural sensitivity and openness to diversity and inclusion in cultural identity, age, gender, race, ability, sexual orientation.	-Demographics, health and social disparities, cultural awareness -Cultural competency -Identification of culturally appropriate, relevant health information and resources	Online Self-assessment: Health Literacy Brief Assessment Quiz. (Agency for Healthcare Research and Quality, 2015): <a href="http://www.ahrq.gov/professionals/quality-patient-safety/quality-resources/tools/literacy-toolkit/healthlitoolkit2-tool3d.html">http://www.ahrq.gov/professionals/quality-patient-safety/quality-resources/tools/literacy-toolkit/healthlitoolkit2-tool3d.html</a>  Self-assessment and Session Facilitator assessment of case studies role play and applied communication skills e.g. Does the Navigator demonstrate effective listening and empathic skills?
	3. Gather, document and share relevant information.	3.1. Use motivational interviewing skills to gather information.  3.2 Maintain timely, comprehensive and accurate records related to patient barriers, interactions, resolution of barriers and other navigation activities.  3.3 Collect research and tracking data as needed or requested.	-Effective communication with PC team and community programs including Motivational Interviewing (MI) and communication strategies to identify patient's health concerns, goals, barriers, and a plan to reduce barriers -Person-centred communication -Components of the navigator log and documentation including patient encounter, CR -Maintenance of accurate and complete records	

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Communicator	4. Share relevant information with PC providers, community services and programs.	4.1. Communicate information in a clear and timely manner with PC providers and the community and facilitate informational continuity.		
Collaborator	1. Work effectively with PC providers, health and social program staff, ARC research team and the larger community.	1.1 Work with PC team to address the needs of patients and optimize effective person-centred care.  1.2. Respect navigator boundaries; know when to refer to PC provider, or other health care provider when patient's needs are not within the navigator scope of practice or competence.  1.3 Establish and maintain positive relationships to support person-centred care.	See training content for Roles of Communicator, Navigator	
	2. Promote navigation role, responsibilities and value to PC providers and the larger community to enhance collaboration regarding patients' health.	2.1 Work with research team to collaboratively improve navigation process.	-Components of the navigator log and documentation including patient encounters, CR -Maintenance of accurate and complete records	

Role	Key Competencies	Enabling Competencies	Training Content	Assessment of Learning
Advocate	1. Advocate for patients about access to community health and social resources.	<p>1.1. Identify the social determinants of health that affect patients' access to CR.</p> <p>1.2 Identify system access barriers: dimensions of approachability, acceptability, availability and accommodation, affordability, appropriateness.</p> <p>1.3. Advocate on behalf of patients to obtain services identified as necessary by PC team.</p> <p>1.4 Advocate on behalf of Francophone patients to know about CR available in French, and to access these resources</p> <p>1.5 Identify and report gaps in CR including the availability of French language resources, to the ARC project team to inform further investments.</p> <p>1.6 Participate in and promote on-going opportunities to support the provision of culturally relevant services to Francophone patients.</p>	<p>-Strategies to develop connections and partnerships with community programs</p> <p>-Also see: content for Communicator role including L'offre active</p> <p>-Empowerment and advocacy to enable patients to access needed services in French</p>	

Role	Key Competencies	Enabling Competencies	Training Content	Assessment of Learning
Educator	1. Educate patients about how to obtain the information, support and resources they need for their health.	<p>1.1. Provide education and support on available community resource options to meet their needs, and facilitate problem-solving to address barriers to access.</p> <p>1.2 Empower patients to reach their health goals by providing information and support, and connecting them to relevant community resources (e. g. mental health, chronic disease self-management).</p> <p>1.3 Promote patients' self-efficacy in managing their own health and in seeking information about CR and navigating CR</p>	<p>-How to use Ontario 211, Champlain or Northeast Healthline</p> <p>-Concepts of empowerment and advocacy</p> <p>-Principles of self-management</p>	
Professional	1. Demonstrate a commitment to ongoing learning, and ability to perform professional responsibilities in an ethical manner.	<p>1.1. "Use organization, time management, problem-solving and critical thinking skills to assist patients efficiently and effectively" (GWUCI, 2014, p. 3).</p> <p>1.2. Engage in ongoing learning and use new knowledge and skills to respond to patient needs and to promote navigation role.</p>		

**ARC Navigator competencies adapted from:**

- Lorhan, S., Wright, M., Hodgson, S., & van der Westhuizen, M. (2014). The development and implementation of a volunteer lay navigation competency framework at an outpatient cancer center. *Supportive Care in Cancer*, 22(9), 2571-2580.
- The George Washington University Cancer Institute (GWUCI). (2014). Core Competencies for Non-Clinically Licensed Patient Navigators.
- Royal College of Physicians and Surgeons of Canada, CanMEDS Framework: <http://www.royalcollege.ca/rcsite/canmeds/canmeds-framework-e>
- Canadian Nurses Association. (2010). Canadian Nurse Practitioner Core Competency Framework. [http://www.cna-aiic.ca/~media/cna/files/en/competency\\_framework\\_2010\\_e.pdf](http://www.cna-aiic.ca/~media/cna/files/en/competency_framework_2010_e.pdf)

**Navigator Competencies and Training Curriculum was informed by the following literature:**

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McMaster University. (2016). Health Tapestry-HC-DM Guide for volunteers. <http://vlc.healthtapestry.ca/>

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