



TOOL 2.10: Core Competency Course Summary

This tool identifies Core Competency Areas for developing a Patient Navigation training curriculum. You can use this to begin to structure your own course. This training series focused on core competencies for Patient Navigators which serve as overarching themes in patient navigation and will be relevant in all four domains of navigation.

This series of trainings were a refresher course for our Patient Navigators. Most had been with the navigation program for a year or more. We wanted to revisit core competencies, such as Role of Patient Navigator and Organizational Skills, as well as talk about things that had come up over the year, such as Dealing with Difficult Patients and Patient Navigator Self Care. We worked with the Central Massachusetts Area Health Education Center (CM-AHEC) to develop a tailored 4 session course based on their Patient Navigation and Community Health Worker trainings.

Four Core Competency Series Spring 2009

Session 1: Role of the Patient Navigator

1. Welcome and Introduction
2. Core Competency Training Overview
3. Class Objectives Review
4. Patient Navigation Research Program (PNRP) Overview
5. History of Community Health Workforce Rundown
6. Patient Navigators as part of the Community Health Center team
7. Patient Navigators as part of healthcare team
8. Patient Navigators' role to engage patients in their medical care
9. Active listening to discover the obstacles to patients' receipt of timely care
10. Responding to improve patients' receipt of timely care
11. Meet your patient / Case Study
12. Structured Networking: Who is on my Team and who do I talk to?
13. Questions and Answers
14. Class Evaluation

The purpose of this class was to identify the Patient Navigator's role within the Community Health Center, to identify ways for Patient Navigators to integrate themselves into the healthcare team, and to learn how to engage patients in their medical care. The class began with a brief overview of the Patient Navigation Research Program (PNRP). Time was then spent on role identification for Patient Navigators as part of the healthcare team. Strategies for improving the integration of the Patient Navigator within the healthcare team were identified.

The second part of the class explored methods of active listening to engage patients and understand the obstacles impacting their receipt of timely care. There was much discussion about how Patient Navigators saw themselves and their role as Patient Navigators at the health centers. Even though they had been navigating for several years, Patient Navigation is an evolving piece of the medical system, and Patient Navigators often face challenges integrating themselves into the healthcare team. The class identified their role within the Community Health Center (CHC), and learned how to integrate themselves with the CHC team by using active listening to better understand their patients' and providers' needs.

Session 2: Time Management and Organizational Skills

1. Class Objectives Review
2. Importance of Organizational and Time Management Skills in Patient Navigators' Work
3. Organizational Strategies
4. Time Management Strategies
5. Structured Networking: Eureka!
6. Priority Setting Strategies to Manage Case Load and Tasks
7. Meet your patient (Case Study review and discussion)
8. Questions and Answers
9. Class Evaluation

This class covered the organizational and time management skills needed by Patient Navigators. The class instructor reviewed the importance of these skills for Patient Navigators, sharing practical strategies for prioritizing caseloads and tasks. As Patient Navigators working in a community health center, they are often pulled in several directions at once. We brainstormed about how to deal with competing demands. General organizational and time management tips rounded out this session. A group networking activity was done where small working groups shared how they organize their space, documents and time using a case study example.

Patient Navigators were engaged, and verbalized how they manage their time and caseloads at the end of the session. Patient Navigators learned how to effectively prioritize caseload, focused on urgency, follow up in between on most pressing issues related to care, attention to the delinquent patients, high risk patients, seeing a big picture, and the broader spectrum of patient navigation.

Patient Navigators identified and practiced two organizational strategies to be incorporated into PNs' daily routine at their health centers. Time management and organizational skills are important, but so is self care. Strategies such as: going for a walk during lunch, taking a lunch break, taking a quick break when you're feeling unfocused or frazzled, and learning to say no to things that you do not have time to do will help prevent burnout and keep Patient Navigators effective in navigation and overall work.

Session 3: Communication Skills

1. Class Objectives Review
2. Work Plan Review (last class follow up)
3. Communication Strategies
4. “I am your PN and I can help” message
5. Structured Networking: Conversation Starters
6. “I am the team’s PN and I can help” message
7. “It is important that I tell you that...” message
8. Meet your patient (Case Study review and discussion)
9. Questions and Answers
10. Class Evaluation

In this interactive session Patient Navigators learned, designed, and practiced effective communication techniques for interacting with patients and with other members of the healthcare team. Educational and advocacy messages with the goal of motivating patients to make and keep appointments were reviewed. For example, starting a conversation with “It’s important that I tell you...” or other attention-grabbing statement will help engage providers quickly and effectively. This helps in getting the follow-up plan for a patient in order to prevent delays in care, also helping the Patient Navigator to become an effective team member.

Patient Navigators broke down into small groups to discuss the case study, focusing on how to communicate the most pertinent information to a provider as quickly as possible, as well as getting the patient in for her care. Patient Navigators developed a one minute empowering message for patients that included what a Patient Navigator is and does.

This class also covered effective communication with other members of the healthcare team. An introductory message for providers and other healthcare team members was also developed, again describing what a Patient Navigator is and how they help patients and providers. Strategies to get attention from the provider in a timely manner were demonstrated and shared, and how to advocate for your patient or yourself with your providers was discussed as a group.

Session 4: Interpersonal Skills & Graduation

1. Class Objectives Review
2. Interpersonal skills
3. Interpersonal styles exploration
4. PN role in difficult situations
5. Strategies to address difficult patients and difficult situations
6. Structured Networking: What would you do in my situation ... (burn out prevention strategies)
7. PN burnout prevention and control strategies
8. Boundaries setting for difficult patient and difficult situations
9. Meet your patient (Case Study review and discussion)
10. Questions and Answers
11. Class Evaluation

Patient Navigators learned strategies for dealing with difficult patients and difficult situations.

A patient may be difficult to schedule (lots of barriers, lots of DNKAs, etc.) or may have a challenging personality (anger, extreme fear, etc). Strategies for dealing with difficult situations, such as a patient yelling at you or a patient's family member trying to get information about the patient, were reviewed and practiced with an eye towards boundary setting.

Working through the case study brought up HIPPA information and other guidelines around patient confidentiality. This class discussed and demonstrated strategies for non-judgmental skills. Handling workplace conflict in addition to dealing with a challenging patient without pulling your hair out was highlighted by the case study.

The case study revealed that respecting a patient's autonomy and personal choices and remaining a source of support and encouragement is a difficult but necessary balance for Patient Navigators. Patient Navigators learned basic strategies to handle a difficult patient/situation in a non-judgmental manner, and how to set boundaries with patients.