



TOOL 2.3 Determining Your Navigation Tasks

This template has been provided for you to create the daily tasks that your Patient Navigators will perform, and who they will be interacting with for each of those tasks.

Tool for Determining Your Navigation Tasks: What do you need a Patient Navigator for? Who will they be interacting with?	Patient	Provider	Other Staff	Support Services
Navigating for specific patient:				
• Make contact to discuss case				
• Educate				
• Schedule appointments				
• Relay results				
• Address barriers to care (issues with transportation, insurance, etc.)				
Maintain system for all patients:				
• Case finding				
• Build internal/external networks				
• Coordinate referrals				
Document/Case Review:				
• Record patient information				
• Actions needed/taken				
• Test results and treatment plan				
Other:				
• Research				
• Provide clinic back-up				
• Create liaisons				