TOOL 2.11: Core Competency Checklist

A competency checklist has been designed by the National Patient Navigation Research Program to assess core competency skills. It is an observational checklist used to measure the quality of patient- Patient Navigator interaction, case management, protocol compliance, and documentation skills.

Date:
Patient Navigator:
Supervisor:

Description of interaction:

Quality	Criteria	Comments
Client Interaction		
1. Established rapport and a therapeutic relationship.	1a. Communicated respect, warmth, and concern. 1b. Formed a partnership within professional boundaries.	
2. **(first visit)** Oriented the client to the agency/program.	2a. **(first visit)** Explained the purpose of the agency/program, described policies and the services provided. 2b. **(first visit)** Provided names and roles of key personnel and contact information.	
3. Communicated in an understandable manner and monitored client's understanding.	3a. Assessed the need for an interpreter; obtained and utilized one if necessary. 3b. Spoke clearly and slowly in conversational tone, using common words without jargon. Used open-ended questions, paraphrasing, and summarization. 3c. Asked client for questions and answered them accurately or told client they would get answer.	

Quality	Criteria	Comments
Care Management		
1. Assessed/Reassessed patient needs.	1. Assisted client to identify needs and concerns.	
2. Obtained and used knowledge of client's cultural, ethnic, religious, and social systems to develop and revise care/action plan.	2. Inquired about client's perceptions, cultural, ethnic, religious and social beliefs, and values.	
3. Appropriately identified of barriers to care.	3a. Articulated and confirmed barriers to care and their order of priority with client. 3b. Engaged the client in goal setting and establishing plan.	
4. Assisted client in assuming responsibility for execution of plan to reduce barriers.	4. Collaboratively determined actions to reduce barriers and who would do what, by when.	
5. Arranged follow-up.	5. Set appointment for next contact.	

Intervention 1. Provided client with factual and appropriate information and education (including materials). 2. Referred and assisted client to access needed resources to meet identified needs.	1a. Used visual, auditory and experiential modes of presenting information and education. 1b. Information and education addressed client's needs and concerns and was correct. 2a. Provided referral(s), explained purpose and how to access. 2b. Assisted client in completing paperwork and applications.	
Documentation 1. Data is accurate, complete, and entered within 24 hours of client interaction.	1a. Data is accurate. 1b. Data is complete. 1c. Data is entered within 24 hours of client interaction.	
<u>Overall Rating Category</u> 7-8 = Meets Expectations 5-6 = Needs Improvement 0-4 = Unacceptable		