



TOOL 3.3: Examples of Patient Navigator Activities

Once you have made your own list of Patient Navigator activities you think you'll be doing, take a look at the list of examples we came up with below to see how they match up. It's okay if the two lists are different. These are just a few examples and your supervisor will be there when you have questions about what you need to do.

- 1) Identifying patients who might benefit from navigation services
 - Look ahead at the health services schedule
 - Get a list of people who had abnormal test results.
 - Check to see if patients with abnormal test results newly available were contacted about them and if they came in for a follow-up appointment
 - Ask providers if there are any particular patients they need your help with
- 2) Scheduling and coordinating appointments
 - Get a schedule of the days and times providers have clinic hours
 - Find out when patients are available for appointments, then work with the health services staff that schedule appointments, or use the electronic schedule tool at your program if you can get scheduling privileges
- 3) Appointment reminders
 - Call patient a few days before they have a scheduled appointment
 - Send patient a letter, text, or e-mail to give written notice of their upcoming appointment and the reason for it
- 4) Patient Education on: health, test results, screening protocols, treatment options
 - Keep patients informed about their health with in person or phone conversations
 - Talks to patients about what an **abnormal result** means
 - Help them understand what comes next
- 5) Tracking patients: following up with results and care plan
 - Look for test results in patient's medical record and talk to their provider about results and plan
- 6) Identify patient barriers
 - Talk to patients about what stops them from getting or continuing care
 - Have conversations with patients about what it would take for them to get or continue getting care
- 7) Take action to bridge patient's barriers (some examples below)
 - Arrange for transportation
 - Help secure new housing/ temporary placement for loss of home
 - Arrange for a social worker
 - Coordinate interpretation services
 - Emotionally support and build trust with patients and community
 - Offer to go with a patient to an appointment, or "check in" during their appointment
 - Be honest with patients about what you can and can't do for them
- 8) Documentation of patient care plan, patient barriers, and your activities
 - Record notes on results and care plan in the system used by your program