

# Patient Navigation: From Outreach to Survivorship

## - A G E N D A -

*Day One*  
*Monday October 25, 2010*

Patient navigators build relationships, solve problems, locate resources and manage information. This portion of the course gives navigators the communication, problem-solving and organizational skills they need to succeed. It also provides an overview of different frameworks of navigation.

### *Learning Objectives:*

- Explain origins of patient navigation
- Identify different models of navigation
- Articulate the current state of the field of navigation
- Describe the role and responsibility of the patient navigator
- Demonstrate effective verbal and non-verbal and active listening skills
- Identify patient strengths and barriers to care
- Describe elements of an effective patient relationship
- List potential roadblocks to communication

### Faculty:

- Steven Patierno, Ph.D.
- Carolyn Perry M.A., LCSW
- Patricia Valverde, M.P.H.

TIME	TOPIC
8:00-8:30AM	Registration and Continental Breakfast
8:30-8:40AM	Welcome
8:40-9:30AM	History of Patient Navigation, Cancer Disparities and Where we are Today
9:30-10:30AM	Patient Navigation Basics
<i>10:30-10:45AM</i>	<i>BREAK</i>
10:45-11:30AM	Role of the Patient Navigator
11:30-12:30PM	Preparing to Work with Patients
<i>12:30-1:30PM</i>	<i>LUNCH</i>
1:30-2:30PM	Communicating Effectively with Patients
2:30-3:30PM	Identifying Barriers to Care
<i>3:30-3:45PM</i>	<i>BREAK</i>
3:45-4:30PM	Clarifying Needs and Establishing Priorities
4:30-5:30PM	Developing and Implementation of a Plan
<i>5:30-6:30PM</i>	<i>NETWORKING</i>

# Patient Navigation: From Outreach to Survivorship

## - A G E N D A -

### *Day Two* *Tuesday October 26, 2010*

8:00-8:30AM

*Registration and Continental Breakfast*

8:30-9:15AM

*Navigation across the Continuum of Care* Mandi Pratt Chapman, M.A.

This session will provide an overview of patient navigation services from outreach to the post-treatment period.

#### *Learning Objectives:*

- Explain core objectives of navigation at each stage of the continuum.
- Describe potential outcomes of navigation at each stage of the continuum.

9:15-10:30AM

*Breakout Sessions*

*OPTION #1: Working with Government and Insurance Agencies*

*FACULTY: Carolyn Perry, LCSW*  
*ROOM: Zenith*

#### *Learning Outcomes:*

- Understand the basics of Social Security Disability coverage and application process
- Overview of Federal and State programs for Health Insurance Coverage
- Information on working with Insurance Companies
- Review of national resources to help guide navigators and patients

*OPTION #2: Cross-Cultural Communication*

*FACULTY: Patricia Valverde, M.P.H.*  
*ROOM: Meridian*

#### *Learning Outcomes:*

- Identify the elements of cross cultural communication.
- Describe effective cross cultural communication techniques using the L-E-A-R-N model.

*OPTION #3: Working with and within Immigrant Communities*

*FACULTY: Larisa Caicedo, M.A.*  
*ROOM: Crescent*

#### *Learning Outcomes:*

- Describe three unique needs of cancer patients in the immigrant community.
- Identify resources available for cancer patients in the immigrant community.

10:30-10:45AM

*BREAK*

10:45-12:15PM

*Professional Boundaries and Ethics*

*Elizabeth Whitley, Ph.D.*

Since patient navigators work closely with patients, develop trust and learn about their personal lives, the line between a professional and personal relationship can become unclear. This session will focus on clarifying the role of a patient navigator and providing tips for keeping patient relationships professional.

#### *Learning Objectives:*

- Describe the role professional boundaries has in helping patients.
- Understand the relationship between personal boundaries and burn-out.
- List risky behaviors that lead to boundary violations.
- Describe ways to maintain healthy boundaries.
- Identify the benefits of stress-management.
- Create a healthy boundaries plan.

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12:15-1:15PM

*Networking LUNCH*

1:15-2:15PM

*How to Evaluate your Program*

*Elizabeth Whitley, Ph.D.*

Patient navigation is an emerging field. Building the evidence-based for these programs will be key to future sustainability. This session gives navigators an overview of research and evaluation activities for patient navigation programs. It also and provides an opportunity for navigators to consider data in their own institution or agency that are feasible and valuable to collect for program evaluation.

### *Learning Objectives:*

- Explain the importance of tracking metrics.
- Describe sources of data and potential limitations.
- Identify site-specific metrics that are feasible and valuable to collect for program evaluation.
- Describe how research and evaluation activities can be used in community based participatory research.

2:15-3:30PM

*Breakout Sessions*

*OPTION #1: Working with Government and Insurance Agencies*

*FACULTY: Carolyn Perry, LCSW*

*ROOM: Zenith*

### *Learning Outcomes:*

- Understand the basics of Social Security Disability coverage and application process
- Overview of Federal and State programs for Health Insurance Coverage
- Information on working with Insurance Companies
- Review of national resources to help guide navigators and patients

*OPTION #2: Cross-Cultural Communication*

*FACULTY: Patricia Valverde, M.P.H.*

*ROOM: Meridian*

### *Learning Outcomes:*

- Identify the elements of cross cultural communication.
- Describe effective cross cultural communication techniques using the L-E-A-R-N model.

*OPTION #3: How to Collaborate with Clinical Teams*

*Faculty: Elizabeth Whitley, Ph.D.*

*ROOM: Crescent*

### *Learning Outcomes:*

- Understand the healthcare system as a culture and explore beliefs, language and practices of its members.
- Discuss the role of patient navigator as member of healthcare teams and develop techniques for communicating effectively with different members of the team.

3:30-3:45PM

*BREAK*

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3:45-4:15PM

*Clinical Trials and the Role of the Navigator*

*Patricia Valverde, M.P.H.*

Navigators can play an important role in improving the care of patients in many ways. One way is to improve the enrollment and participation of patients into clinical trials. This session will facilitate a discussion in response to the clinical trials module completed by trainees prior to the live training. The online module and the live discussion will provide an overview of clinical trials, the role of navigators in clinical trials recruitment, the role of informed consent in human subjects' protection, and avoidance of coercion during the recruitment and consenting process.

### *Learning Objectives:*

- Describe why participation in clinical trials is important, especially for underserved and minority patients.
- List the four ways participants in clinical trials are protected.
- Describe the hallmarks of properly obtaining informed consent.
- Describe how to avoid undue influence and coercion during the recruitment and consenting process.
- Identify common reasons for non-participation in clinical trials and potential strategies to address them.
- Demonstrate the ability to locate and communicate trusted sources of information about clinical trials.
- Describe the appropriate role(s) of navigators in clinical trials.

4:15-5:30PM

*Panel Discussion: Navigation Models in Practice*

*Facilitator:  
Mandi Pratt Chapman, M.A.*

We will bring together lay, social work, and nursing Patient Navigators to discuss differences in approach to navigation and how these roles compliment each other. Representatives from community-based and clinical settings will convey best practices.

### *Learning Objectives:*

- Describe the role of the patient navigator in a variety of settings.
- Identify how different navigator roles can compliment each other.
- Apply best navigation practices in various settings.

5:30-6:30PM

*Networking Reception*

# Patient Navigation: From Outreach to Survivorship

## - A G E N D A -

### *Day Three*

*Wednesday October 27, 2010*

*8:00-8:30AM*

*Continental Breakfast*

*8:30-9:30AM*

*Advanced Patient Navigation: Care  
Coordination*

*Patricia Valverde, M.P.H.*

In this session participants will examine techniques to navigating and coordinating a patient's care inside a healthcare system and discuss how to educate patients on their appropriate use. Patient coaching strategies to maximize medical visits will be reviewed and practiced.

#### *Learning Objectives:*

- Identify coaching and supportive strategies for patients prior to, during and after medical visits.
- Identify elements of proactive care planning.

*9:30-10:15 AM*

*Impact of National Health Reform on  
Patient Navigation*

*Jennifer Lee, M.D., M.P.H.*

This session will explain in laymen's terms what national health reform law means for patient navigators helping their patients, and for patient navigation as a field. It will focus on what reform means for the full range of cancer care from prevention through end-of-life and provide an explanation of how reform will impact patients and providers.

#### *Learning Objectives:*

- Describe key elements of recently passed national health reform laws
- Identify impact of national health reform on cancer patients, caregivers, patient navigators, and health care providers.
- Identify implications of national health reform for cancer prevention, detection, treatment and survivorship.

*10:15 - 10:30 AM*

*BREAK*

*10:30-1:00PM*

*Motivational Interviewing: Part 1*

*Kathleen Garrett, M.A.*

The primary goal of this session is to present an introduction to Motivational Interviewing (MI). This will include an overview of the spirit of MI and an introduction to basic MI principles and skills. This introductory workshop incorporates key concepts of the Stages of Change (Transtheoretical) Model and Motivational Interviewing techniques in the context of patient navigation. The Patient Navigator should NOT fix the patient and/or develop problem-solving skills for the patient (client).

#### *Learning Objectives:*

- Describe the MI spirit which is based on collaboration, empathy and respect for client autonomy.
- Identify the four key MI strategies: open ended questions, affirmations, reflective listening, and summarizing (OARS).
- Demonstrate basic strategies that will enhance patient readiness to change.

*1:00-2:00PM*

*Networking Lunch*

# Patient Navigation: From Outreach to Survivorship

## - A G E N D A -

*2:00-3:30PM*

*Motivational Interviewing: Part 2*

*Kathleen Garrett, M.A.*

*3:30-4:00PM*

*Course Evaluation*