

Patient Navigation Orientation Checklist

Name: _____
Start Date: _____

Key Components of Role	Preceptor Sign-off/Date
Hospital-specific policies/procedures and mandatory educational programs	
Navigation definition and models of navigation	
Benefits and goals of navigation	
Job description, roles, and responsibilities	
Commission on Cancer standards and cancer committee responsibilities	
Institute of Medicine; review conceptual framework	
NCCN, ASCO, and other national guidelines	
Referrals to the navigation program	
Internal resources, roles, and responsibilities: <ul style="list-style-type: none"> • Social worker • Registered dietitian • Financial counselor • Pastoral care • Genetic counseling • Tumor registry • Rehabilitation team • Palliative care team • Hospice team • Other _____ 	
Community resources, list _____	
Patient educational materials, ie, disease site-specific information, clinical trials, patient journal, etc	
Caregiver tool kit and resources	
Assessment tools, documentation, and reporting	
Communication and managing transitions with the patient, family, and/or caregiver	
Communication among the healthcare team, internal and external resources	
Patient Experience Survey Process	
Performance improvement models and initiatives: <ul style="list-style-type: none"> • Patient experience • Clinical outcomes • Business performance 	
Support groups and educational programs	
Tumor conference responsibilities	
Multidisciplinary participation and responsibilities	
Professional organizations and certification <ul style="list-style-type: none"> • AONN+ • Association of Oncology Social Work 	
Other, list _____	

Annual Navigation Competency Checklist

The following checklist is to be completed on a yearly basis and kept in the employee file. Employee Name: _____ Date completed: _____

Competencies	
Commission on Cancer Standards	<ol style="list-style-type: none"> 1. Click on www.facs.org/~media/files/quality%20programs/cancer/coc/2016%20coc%20standards%20manual_interactive%20pdf.ashx 2. Review interactive PDF of Commission on Cancer standards
Community Needs Assessment	Add link or reference document to review for institution
AOSW and ONS Navigation Core Competencies	<ol style="list-style-type: none"> 1. Click on www.ons.org/sites/default/files/ONNCompetencies_rev.pdf?__hstc=214899912.fdd7a7debc8575bac5a80cf7e168316a.1426636800129.1426636800130.1426636800131.1&__hssc=214899912.1.142 2. Review PDF of ONS Navigator Core Competencies
Cancer Committee Goals and Quality Improvements	Need to add link or specific goals for institution
Health Literacy Training	<ol style="list-style-type: none"> 1. Click on http://health.gov/communication/literacy/quickguide/Quickguide.pdf 2. Review PDF of Quick Guide to Health Literacy
Cultural Competency Training	<ol style="list-style-type: none"> 1. Click on www.jointcommission.org/assets/1/6/roadmapforhospitalsfinalversion727.pdf 2. Review PDF of The Joint Commission Cultural Competency Training
Navigation Reports and Performance Improvement Activities	Add link or specific reports for institution
Annual Mandatory Training	<ul style="list-style-type: none"> • Hazardous materials/waste • Hurricane disaster plan • Disaster drill/terrorism plan • Infection control • Fire safety • Workplace safety • National patient safety goals • Materials safety data sheets • OSH control • Other