

## Navigator Competencies Checklist

Competancy
<p><b>OneNote:</b> Microsoft OneNote, specifically the KPNW Navigator Notebook, is a space for information housing and communication.</p>
<p><b>Escalation Pathway &amp; Interdisciplinary Teamwork:</b> With all disciplines working at top of their scope, some overlap is expected between roles. Community Health Navigators and their colleagues, are expected to follow their clinical escalation pathways. See also, KPNW Social Needs Interdisciplinary Practice Guideline (aka, Escalation Pathway) and Navigation, Social Work, and Behavioral</p>
<p><b>Pre-Manage:</b> PreManage is a Care Coordination solution that allows Insurers, Primary Care Providers, Case Managers, Health Homes, managed care organizations, accountable care organizations and other providers to identify patients who require additional attention, case management, and who may be better served in care settings other than the ones they are frequenting.</p>
<p><b>MMIS:</b> Medicaid Management Information Systems. A mechanized claims processing and information retrieval system for Medicaid that's required by the federal government and operated by CMS (Centers for Medicare and Medicaid Services). In Oregon, this is simply called, MMIS.  <b>ProviderOne:</b> Medicaid Management Information System for Washington.  <b>CIM6:</b> Community Integration Manager. HealthShare web portal; supplements MMIS by allowing provider office staff to verify what plan partner a Health Share member is assigned to.  <b>Molina:</b> Supplements ProviderOne by allowing provider office staff to verify Molina benefits.</p>
<p>Navigator understands how to access and utilize Oregon and Washington's state Medicaid portals as well as their</p>
<p><b>ED Bounceback:</b> The ED Bounceback Report informs on patients that have been to the ED more than once in a 7 day period.</p> <p>Navigator understands how to evaluate ED Bounceback report and review charts for outreach to members that have bounced back to ED within 7 days; the goal in this work is to, within our means, reduce KPNW's 30-day bounceback rate. It is imperative that Navigator has thorough understanding of ED Bounceback Workflow and pathway for escalation; it's also important to note that much of this work involves efficiently coordinating care</p>
<p><b>Medi-Medi:</b> Medi-Medi is a term used to describe benefits enrollment to Medicare and Medicaid, as well as having each of those benefits aligned to the same care coordination entity.</p> <p>Navigator understands who, when, and how to align Medicare and Medicaid benefits; understands tools and</p>
<p><b>Vetting Resources:</b> Collaborating with community agencies and being a SME in hyper-local resources in a large part of the Navigator role.</p> <p>Navigator understands what details are involved when vetting a resource (see <i>Vetting Form</i>) and the importance</p>
<p><b>Telephony:</b> Telephony encompasses all guidelines and agreements surrounding TBC teamline and Navigator Cell Phone use.</p> <p>Navigator understands and follows <i>Navigator Mobile Telephony</i> (see guideline) and TBC TeamLine Agreements</p>

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<p><b>KP Health Connect:</b> Kaiser Permanente's EPIC Electronic Medical Records system.</p> <p>Navigator displays thorough understanding of how to efficiently complete a chart review, view and edit the Longitudinal Plan of Care (LPOC), and documentation best practices to include use of the Social Needs SmartSet</p>
<p><b>Social Needs Smart Set:</b> Epic SmartSet tht allows for documentation and diagnosing of social determinents of health, as well as referring to community resources as an order.</p>
<p><b>Motivational Interviewing I:</b> In this training, "common" and "better" examples of medical encounters are evaluated, where the hope is that the patient will take action or make a change. Participants practice concrete strategies and tools that increase patients' likelihood of taking positive action to manage their health.</p> <p>Navigator attended training; utilizes basic MI methods to encourage healthy lifestyle discussions during patient</p>
<p><b>Motivational Interviewing II:</b> Participants in this training become more cognizant and active so they can be more effective in building patient motivation even when none or very little is apparent. Participants will be guided through a sequence of learning activities to move from basic to more advanced skillfulness.</p>
<p><b>Mental Health First Aid:</b> Mental Health First Aid is an 8-hour course that gives people the skills to help someone who is developing a mental health problem or experiencing a mental health crisis. The evidence behind the program demonstrates that it does build mental health literacy, helping the public identify, understand, and respond to signs of mental illness.</p> <p>Navigator has the skills necessary to provide initial help and support to someone who may be developing a</p>
<p><b>Certified Medicaid Application Assister/Counselor:</b> Navigators having "Assister" or "Counselor" access to the Oregon One and WA Health Plan Finder portals to assist patients in applying for Medicaid allows for real-time, in the moment Medicaid approval/denial. This allows for Navigators to have the knowledge and training to...</p> <ul style="list-style-type: none"> <li>o More effectively education patients on their benefit options.</li> <li>o Assist patients in understanding their breadth of coverage with Medicaid.</li> </ul> <p>Navigator has gone through the training and background check process required by their respective state and</p>
<p><b>Financial Health:</b> Millions of KP members live at or below the 200% federal poverty line and are challenged by the out of pocket expenses of their healthcare. Members, as well as providers, have expressed the need for cost transparency and financial options to support patients in making an informed decision about their care.</p> <p>Navigator attended all recorded WebEx trainings on Financial Health and knows how and when to collaborate with Financial Counselors and Pharmacy when needs arise.</p>

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<p><b>Virtual Care:</b> Our vision is that KP’s virtual care choices make Kaiser Permanente the easiest and most cost-effective place to receive and provide care.</p> <p>Navigator understands virtual care options afforded to members, how to assist with KP.org and how to use the</p>
<p><b>Patient and Family Centered Care:</b> Training included in Ambulatory Nursing and Optimization (ANOO); promotes the partnership between healthcare teams and members where the values, needs, and preferences of the member are honored; the best evidence is applied; and the shared goal is optimal functional health and quality of life.</p>
<p><b>Trauma Informed Care:</b> Trauma Informed Care is an organizational structure and treatment framework that involves understanding, recognizing, and responding to the effects of all types of trauma</p> <p>Navigator is aware of what it means to understand, recognize, and respond to the effects of all types of trauma. Displays that they know that we build trust when we know how to better care for members that have</p>
<p><b>Life Care Planning:</b> Life Care Planning is a 1-day (8am – 4:30pm) training aimed at having Advance Directive conversations with members and their agents/decision makers. You’ll receive guidance in discussing members’ values, goals, and wishes if they were in the event of a serious accident or illness.</p> <p>The “pre-work” for the class entails 4 online modules which take about 3 hours to complete; you can start and stop at your convenience. These modules are typically assigned to you about 3-4 weeks prior to the 1-day in-person training. Participants are also asked to complete their own practice Advance Directive to bring to class, as well as initiate an LCP conversation with a family member or friend. After the in-person training is complete, a documentation training is assigned via HealthStream which takes about 15 minutes.</p>