

LESSON INTRODUCTION

Welcome to Professional Development and Practice-Based Learning, part of the Oncology Patient Navigator Training: The Fundamentals course. My name is Nancy Peña, Director and Founder of Navegación de Pacientes Internacional (NPI) and I will be your presenter for this lesson.

Before we begin, we would like to acknowledge the Centers for Disease Control and Prevention for supporting this work. Its contents are solely the responsibility of the authors and do not necessarily represent the official views of the Centers for Disease Control and Prevention.

We would also like to thank the Patient Navigator Training Collaborative of the Colorado School of Public Health for so generously sharing materials from their in-person training, parts of which we have adapted for this online training.

Additionally, we would like to acknowledge the following professionals for their part in revising this training:

- Monica Dean, Academy of Oncology Nurse & Patient Navigators
- Nancy Peña, Navegación de Pacientes Internacional
- Jess Quiring, Patient Navigation Advisors
- Zarek Meana, Patient Navigation Advisors
- Reesa Sherin, Association of Cancer Care Centers

After completing this lesson, you will be able to:

- Develop and implement a professional development plan, including setting goals and finding opportunities to learn and improve.

ONCOLOGY PATIENT NAVIGATOR TRAINING: THE FUNDAMENTALS

Professional Development and Practice-Based Learning

- Create professional development goals based on identified areas for growth.
- Describe and implement strategies for building trust, performing duties accurately, and managing work efficiently.
- List organizational, time management, problem-solving, and critical thinking skills to assist people effectively.
- Identify and use potential information technology tools to enhance efficiency.
- Identify sources of feedback for improving daily work and professional growth.
- Develop and implement strategies for giving, receiving, and using feedback constructively.
- Identify and use tools for dealing with ambiguity and uncertainty in professional settings.
- Identify and implement self-care strategies for maintaining personal well-being.

This lesson is divided into 4 parts. In the first part, we will explore how goal-setting can significantly impact professional growth. The second part will focus on building trust with patients and key skills needed by navigators. In the third part of the lesson, we will discuss giving and receiving feedback. And the final part will cover responding to ambiguity, understanding stress, and avoiding burnout.

Join me in the next video to get started.

LESSON SECTION I

In this part of the lesson, we will focus on how goal-setting can significantly contribute to professional growth. Setting clear and effective professional goals is key to guiding your development and achieving your career aspirations.

Goal setting is much more than simply identifying what you want to achieve. It serves several essential purposes:

- It triggers new behaviors that help guide your focus and promote self-mastery.
- It allows you to track your progress, so you can measure improvements and make necessary adjustments along the way.
- It serves as a powerful motivator, increasing your confidence as you achieve each milestone.
- Lastly, setting goals helps you manage and improve upon areas you may not yet fully understand, leading to greater success and well-being.

Furthermore, there are different types of goals—some focus on mastering a skill, while others focus on performance compared to peers. Research shows that the right type of goal will depend on the situation, but ultimately, the clarity and challenge of a goal are what drive motivation and better performance.

As you set professional goals, remember that you will also need feedback to assess your progress. Constructive feedback helps guide your efforts, highlights areas of improvement, and encourages self-reflection. By incorporating feedback and setting achievable, realistic goals, you will enhance your professional development and track your journey toward success.

Let's take a deeper dive into SMARTIE goals and how you can use them to build a solid professional development plan.

Take a moment to review this video on SMARTIE goals. Please note that while this video focuses on SMART goals, a SMARTIE goal is an improved professional

development framework for goals. The I in SMARTIE is for inclusivity and the E is for Equity.

[VIDEO]

SMARTIE goals offer a structured approach to setting clear and effective goals, whether for personal or professional development. The acronym SMARTIE stands for Specific, Measurable, Achievable, Relevant, Time-bound, Inclusive and Equitable. It's a useful tool that can guide you toward achieving your objectives with greater clarity and focus.

To create a SMARTIE goal, it's essential to start with a specific goal. As demonstrated in the video with Janisha, having a clear and well-defined goal provides direction. Just as Janisha outlined her plans for an upcoming trip, it's important to establish clarity in your goals to set yourself on the right path.

Incorporating measurable metrics is key to tracking your progress. By setting measurable criteria, you can monitor how far you've come, identify any necessary adjustments, and stay motivated as you see tangible evidence of your progress. For example, if your goal is to improve your professional skills, measurable metrics could include completing a certain number of training hours or achieving a specific certification.

Achievability is another important element of SMARTIE goals. It's important to assess whether the goal is realistic within the given timeframe and with the resources available. Ask yourself: Is this goal attainable given my current circumstances? Do I have the skills, time, and resources needed to accomplish it? While it's beneficial to

challenge yourself, setting achievable goals helps maintain motivation and avoids unnecessary frustration.

Relevance is about aligning your goals with broader aspirations and long-term plans. If a goal doesn't fit with your overall vision, it might be worth revising. Consider how each goal connects to the larger picture of what you want to achieve in your career or personal life. If your goal is part of operationalizing a new practice in your institution, be sure the goal aligns with institutional mission, vision and strategic imperatives.

Setting time-bound goals is essential for maintaining momentum. Deadlines create a sense of urgency and help keep you accountable. Establishing a timeline for your goals allows you to measure progress over time and keeps your efforts focused.

Finally, ask yourself is your goal inclusive and equitable. By incorporating an equity and inclusion component to your SMARTIE goals, you can make sure your organization's commitment to health equity and inclusion is anchored by tangible and actionable steps.

After working on your goal, it's important to take the time to reflect on the progress you've made. Reflection allows you to assess what has been working well and where adjustments may be needed. This practice not only helps you learn from your experiences but also helps to align your goals with your evolving aspirations.

Once you've clearly defined your goals, it's time to create your professional development plan.

A professional development plan serves as a roadmap for your career, helping you track your progress and guide your development activities. Whether for personal use or as part of an employer's review process, a structured plan is essential. To build an effective professional development plan, consider the following steps:

1. Define Your Area of Development – Start by identifying the general skills or competencies you want to develop. For example, you might aim to improve public speaking, leadership, or project management.
2. Set Development Objectives or Goals – Be specific about what you want to achieve. For example, if your goal is to improve public speaking, you might aim to speak at local events first and eventually at national conferences.
3. Identify Behaviors to Develop – These are the natural habits or behaviors that will help you achieve your goals. For example, becoming more self-aware of how you project your voice or practicing articulation during speeches.
4. List Actions to Create Progress – Take practical steps that will lead you to success. For instance, attending public speaking workshops, joining groups like Toastmasters, or seeking feedback from peers.
5. Track Progress and Set Timelines – Regularly track your progress and set review dates to ensure you're moving in the right direction. For example, you could set quarterly goals to speak at increasingly larger events.

By following these steps, you'll create a structured, actionable plan that can drive your professional growth.

This is an example of a professional development plan. You can see that it includes goals on the far left, then resources that can be used to help meet goals. It also includes a plan with deadlines, which are important, as well as a column on the far right to track your progress.

This sample plan includes 3 goals that focus on improving skills and knowledge. Take a moment to read through it.

A template for your professional development plan is available in the resources section of the learning management system.

As you make your professional development plan, think about different sources of new knowledge related to both patient navigation itself and to professional growth. This could include:

- Conferences, such as the Academy of Oncology Nurse and Patient Navigators annual meeting
- Local or regional meetings, such as a state or city patient navigator network
- You may also be able to find a special interest group online or in person that discusses issues related to a particular topic, such as Medicaid or time management
- Listservs which connect professionals by email, and newsletters, may provide useful information. For example, our TAP team regularly sends out information about patient navigation and cancer survivorship
- You can stay up to date with the latest research through journal articles if you have access. The Academy of Oncology Nurse & Patient Navigators has a journal specifically focused on patient navigation called the Journal of Oncology Navigation and Survivorship
- Professional development websites, such as Mind Tools, can offer tips for professional development. LinkedIn Learning is another site that offers online video tutorials and training across a variety of topics, including using computer programs and career development.

- Finally, networking can be helpful in expanding your knowledge and skills. Networking means finding individuals who are in a similar field or who have knowledge that could be helpful to you. It is all about making and maintaining relationships and learning from peers in your field.

Taking advantage of learning opportunities is essential to growing professionally and achieving the goals outlined in your professional development plan. Some effective ways to enhance your skills and knowledge include:

1. Take Professional Development Courses or Certifications – Enrolling in professional development courses can expand your skill set and introduce new knowledge. Certifications let others know that you have taken the time to improve in a given area.
2. Access Online Resources – From scholarly articles, blogs, videos, and industry news sites, the internet has plenty of free resources available to help you reach your goals.
3. Stay Updated in the Industry – Regularly checking industry news, attending webinars, or subscribing to newsletters helps you remain aware of trends, updates, and advancements in your field, keeping you at the forefront of knowledge.
4. Attend Professional Events and Conferences – Attending professional events is a great way to network and gain insights directly from industry experts. These events offer valuable learning opportunities, whether through workshops, seminars, or roundtable discussions.
5. Attend Networking Events – Networking events provide opportunities to specifically meet peers and experts who can offer new insights or open doors to

further learning. Building a strong professional network can be helpful for personal growth and career development.

6. Learn from Others – Find a mentor, or someone who is willing to offer you advice about how to achieve your goals. Think about someone who already demonstrates that skill very well and ask a few questions to help you improve.
7. Learn New Technology and Software – Staying up to date with the latest technology advancements is important to remaining competitive in your field. Focus on technologies that directly impact your work and explore new tools that can improve your efficiency, such as project management or time-tracking software.
8. Improve Hard and Soft Skills – Conduct regular self-assessments to evaluate both your hard and soft skills. Use tools to understand your strengths and how to apply them for personal growth and career success.
9. Develop In-Demand Skills – To stay competitive, focus on developing skills that are currently in demand within your industry. Look at job descriptions and industry trends to identify which skills will help you adapt to market needs. Also think about what additional skills would be useful to help the people that you work with daily.
10. Create a Professional Development Plan – Once you've identified the areas for growth, create a concrete action plan with realistic goals and timelines for achieving those goals.

As a navigator, maintaining high standards of professionalism is essential to providing the best possible care for patients. Let's review the key standards:

1. Assume Personal Responsibility for Professional Development

Navigators must take responsibility for their own learning and development, ensuring that they continually gain and maintain the knowledge necessary to serve the best interests of their patients.

2. Engage in Ongoing Professional Development

Continuous professional development is key. Navigators should strive for improved competence within their scope of practice by actively participating in learning opportunities and professional growth activities.

3. Reflect on Practice to Identify Gaps

Regular self-reflection is important. Navigators should reflect on their knowledge, skills, and attitudes to identify any gaps in their professional practice and seek ways to address these through professional development and lifelong learning.

4. Seek New Knowledge to Stay Current

It's important to stay up to date with advancements in oncology navigation and cancer care. Navigators should seek new knowledge and competencies that reflect current trends in the field, promoting critical and forward-thinking approaches to patient care. By keeping these standards in mind, navigators can ensure they are providing high-quality, informed, and patient-centered care, while also fostering their own professional growth.

[CHECKPOINT]

LESSON SECTION II

Skills, such as active listening, maintaining boundaries, and respecting patient rights, are all essential for building trust with both patients and colleagues. Trust is the foundation for better communication, which leads to improved outcomes. People will rely on you to keep their best interests in mind, and you'll be recognized as a key resource for accessing the services and support they need. Similarly, your colleagues will view you as a valuable member of the healthcare team.

Patient navigators can borrow from the business and management sciences to be responsive to people's' needs. Customer responsiveness has been described as "accurately and insightfully giving customers what they need, want or don't yet know they want" and doing so as quickly as possible while maintaining appropriate professional boundaries. Patient navigators can apply this concept and use active listening, which involves fully focusing on, understanding, and responding to what the other person is saying, without making assumptions or jumping to conclusions. This skill is key when assessing a patient's needs. Instead of assuming what the patient needs, use active listening to assess the patient's concerns and then respond to the needs they have clearly expressed. Let the person's needs and requests guide your priorities when sharing resources and information. Ask: What does this person need? How can I help them meet the need in a timely manner? By getting to know the person, patient navigators can also anticipate potential barriers during the course of treatment and develop an action plan to address those as needed. While it's important to respond to what someone has expressed, it's also part of your role to think about the bigger picture. This includes identifying needs, barriers, and gaps that this person may not be aware of but which could affect them throughout the cancer continuum. By

addressing these unseen barriers, you can help ensure smoother access to care and better outcomes for the people you work with.

Navigators also need to prioritize needs based on importance, and refer patients to knowledgeable staff that can best address their needs as quickly as possible. Patient navigators can prioritize patients' needs based on severity of the situation and the magnitude of impact of barriers to care. Patient navigators should work to get to know their patients and the challenges they face. By knowing the person, what's important to them, and what they perceive to be barriers to care, navigators can improve their ability to meet those needs. Strategies for being a responsive navigator include being highly organized, managing your time well, developing problem-solving and critical-thinking skills and managing your workload.

While your primary focus as a navigator is working directly with people with cancer, you also have several important administrative duties that support your role. These responsibilities can include:

- Reaching out to patients via mail, phone, or in person
- Providing educational information or organizing educational events
- Documenting barriers and the actions taken to resolve them
- Offering logistical support, such as helping with scheduling and arranging screenings
- Gathering information about access to cancer care and screenings
- Sending communication through mail, including screening reminders, information packages, and educational materials
- Placing reminders on patients' medical charts
- Making follow-up phone calls to ensure patients stay on track with their care

As you progress in your role, you'll be expected to take on more complex responsibilities such as conducting risk assessments, mentoring newer navigators, and sharing your knowledge at professional meetings or conferences. Whether you are identifying goals and barriers for people at the entry or intermediate level or implementing action plans and educating others at the advanced level, each task plays an important role in providing patient-centered care.

To manage these tasks efficiently, strong organizational, time management, problem-solving, and critical thinking skills are needed. These skills will help you prioritize your duties, so that you can meet patient needs in a timely and responsive manner.

To operate more efficiently, patient navigators should adopt the following organizational and time management skills, which are essential for managing competing responsibilities and meeting a person's needs:

1. **Avoid Multitasking:** Multitasking may seem productive, but research shows it reduces efficiency and increases the likelihood of mistakes. Instead, focus on completing one task at a time with minimal distractions. This will allow you to devote your full attention to the task at hand, improving accuracy and ensuring that patient needs are properly addressed. Tools like the Eisenhower Matrix can help you prioritize tasks, ensuring that you stay focused on the most important ones first. The Eisenhower Matrix is a method to organize tasks by urgency and importance. It helps you to effectively prioritize your most important work. This method allows you to prioritize your tasks visually in different quadrants labels as "Urgent-Important," "Urgent-Not Important," "Not Urgent-Important," and "Not Urgent-Not Important." To learn more about the Eisenhower Matrix, refer below this video.
2. **Prioritize Tasks Based on Importance and Urgency:** Prioritization is important when managing multiple patient needs or projects. Use a framework like the

Eisenhower Matrix to evaluate the urgency and importance of tasks. Prioritize those that have the greatest impact on health outcomes or that are time-sensitive. Regularly reassess your priorities to adjust for changing circumstances, and remain flexible as new tasks arise.

3. **Delegate Tasks Effectively:** Delegating tasks allows you to distribute the workload more evenly and focus on higher-priority activities. Identify non-priority tasks that can be handled by other team members and delegate based on their skills and availability. Provide clear instructions and expectations, and ensure that clinical concerns are referred to the appropriate healthcare professionals. Delegation helps maintain alignment and ensures that people receive timely care without overburdening any one team member.
4. **Communicate Clearly and Regularly:** Communication is key to ensuring that both patients and healthcare teams are aligned. Use communication tools like team chat apps or project management platforms to keep everyone informed. Provide clear updates, share information, and set expectations. Regular communication with both patients and colleagues helps ensure that tasks are completed on time and that everyone is aware of their responsibilities. Be proactive in communicating changes or urgent needs to avoid miscommunication or missed deadlines.
5. **Be Organized and Use Tools to Stay on Track:** Using organizational tools like Gantt charts, task lists, or project management software can help you stay on track when handling multiple patient needs or projects. These tools give you a clear visual timeline, helping you manage task dependencies and deadlines effectively. Regularly updating your timeline and reviewing progress ensures that you remain on track and can address any delays or issues as they arise.

6. **Plan Your Projects and Break Down Large Tasks:** When managing larger patient care plans or projects, break them down into smaller, manageable tasks. Use project management techniques to establish clear goals, timelines, and deadlines. The SMARTIE framework (Specific, Measurable, Attainable, Relevant, Time-bound, Inclusive, Equitable) is an effective way to set achievable goals. A well-organized project timeline helps you visualize task sequences, deadlines, and resources, making it easier to stay on schedule and meet patient needs efficiently.
7. **Monitor Progress and Stay Flexible:** It's important to monitor your progress as you work through your tasks. Use project management tools to track deadlines, assess progress, and adjust timelines as needed. Flexibility is key—circumstances may change, and being able to adapt without sacrificing quality is essential to navigating complex patient needs or projects. Regularly reviewing progress allows you to identify bottlenecks and make any necessary changes. We will visit this topic more in the Evaluation lesson.
8. **Avoid Procrastination and Stay Focused:** Procrastination can lead to stress and missed deadlines, so it's important to avoid putting off tasks. Break large tasks into smaller, manageable steps and focus on making progress. Optimizing your work environment by eliminating distractions can also help maintain focus. Time management techniques like timeboxing or the Pomodoro technique can help you stay engaged with tasks in short, focused intervals, improving productivity and reducing overwhelm.

By implementing these organizational and time management strategies, patient navigators will be better equipped to manage competing deadlines, prioritize patient needs, and provide high-quality care efficiently.

Time management is essential to being a successful navigator. You may be asked to do many things by patients, clinicians, and co-workers, all of which are important to your job. To help manage these demands effectively, consider adopting the following habits:

1. **Structure Your Schedule:** While you may not have complete control over your schedule due to the nature of patient care, you can still plan ahead to anticipate the unexpected. For example, if Monday mornings are typically busy clinic days, block off that time for patient needs only. Avoid scheduling other tasks or meetings during high-demand times.
2. **Time Your Activities:** Track how much time you spend on different tasks to understand your workflow better. Knowing how long tasks take will help you allocate your time more effectively and ensure you stay on schedule. Time management tools, such as task timers or time-tracking software, can be useful in this process.
3. **Commit to Downtime:** Make sure you're getting the rest you need to perform at your best. Downtime is essential for maintaining peak performance and avoiding burnout. Be mindful of how you manage your time outside of work, ensuring you have time to recharge.
4. **Stay Organized:** Use checklists, calendars, or tracking tools that help you keep track of tasks and deadlines. There are many organizational tools available that can help you manage both patient care and administrative duties. Many programs now use live documentation, which allows you to record patient interactions in real time. This practice ensures that your documentation is accurate and up to date, without needing to catch up later. Utilizing tracking software or electronic health records (EHR) can streamline your workflow and help you stay organized while documenting patient interactions efficiently.

Discuss with colleagues or other navigators to share ideas for staying organized and improving time management.

Problem-solving skills are essential, and the same cycle used when assisting people can be applied to other situations, such as implementing a new distress screening process.

Let's go through the process:

1. **Define the Issue and Gather Information:** First, clarify the issue. The team identifies that patients need to be screened for distress at key points in their care. Gather relevant data—how many people are currently screened, the purpose of the screening (quality improvement or accreditation), and what constitutes a "key visit."
2. **Identify Key Players and Brainstorm Solutions:** Determine who should be involved. The team agrees that a nurse and front desk staff are important. Then, brainstorm different approaches for implementing the screening. Options might include having the doctor, nurse, patient navigator, or front desk staff handle screenings.
3. **Evaluate and Choose the Best Option:** Weigh the pros and cons of each approach. While a doctor's screening would be thorough, they may lack time. The front desk can see every person but may not have the expertise to answer questions. Ultimately, the team decides on a collaborative approach: the front desk identifies patients, the patient navigator conducts the screenings, and issues are triaged to the appropriate team members (social worker for psychosocial issues, nurse for physical concerns).
4. **Create an Action Plan and Implement:** The team pilots the process for a month, gathers feedback, and refines the process. Each team member documents

patient interactions and referrals in the medical chart, ensuring a smooth workflow.

5. Follow Up and Refine: After implementation, the team meets again to assess whether the process is effective. They discuss challenges, patient benefits, and make any necessary adjustments to improve the workflow and patient experience.

Critical thinking is a deliberate and active process of assessing and regulating one's thinking to avoid errors and ensure sound decision-making. It is especially important in fast-paced environments like oncology navigation, where decisions often impact health outcomes. Here are key components of critical thinking based on strategies that help prevent cognitive errors:

- Analyzing: This involves breaking down complex situations into smaller parts for better understanding. What's the issue? By asking this question, you can identify the core problem without jumping to conclusions, a common cognitive bias known as premature closure.
- Applying Standards: Judging situations according to professional or clinical standards helps prevent errors. It's essential to shift from Type 1 thinking (intuitive) to Type 2 thinking (analytical) when the situation is complex. Ask yourself: Where have I seen this before? What professional standards apply?
- Critical distinction: Recognizing differences between situations and categorizing information accurately helps prioritize decisions. This prevents the confirmation bias where we only acknowledge information that fits an existing belief. Ask: What is the priority here?
- Information Seeking: Gathering all relevant facts and evidence is important to avoid errors caused by availability bias (relying too heavily on easily available

information). Ask yourself: What don't I know? Being thorough in seeking information avoids oversights.

- Logical Reasoning: Logical reasoning enables drawing justified conclusions from available data. It helps combat biases like anchoring (relying too heavily on initial information). You can ask: Why is this happening? Are all the facts in alignment?
- Predicting: Predicting outcomes and envisioning consequences can help prevent rash decisions. Always consider: What's going to happen if I proceed this way? By doing so, you encourage the use of Type 2 thinking, which is slower but more deliberate.
- Transforming Knowledge: Using past experiences to solve new problems is valuable, but it's also important not to rely solely on pattern recognition, which is part of Type 1 thinking. Ask: What's worked before that I could try again? This encourages inductive reasoning, which uses multiple facts to form a hypothesis instead of relying on familiar patterns.

[CHECKPOINT/CASE STUDY]

To be as efficient and effective as possible, it's important to manage your workload carefully. Start by prioritizing tasks and asking yourself:

- What tasks must be completed today to directly impact patient care?
- Is there something I'm doing that could be delegated to someone else, while staying within the scope of practice?
- Are there responsibilities the person or family members could take on that would benefit the patient's overall care and autonomy?

By regularly evaluating your workload this way, you can focus on what truly matters and improve both health outcomes and your own efficiency.

Effectively managing your workload means understanding that being actively engaged does not always equate to being productive. It's important to track your progress to highlight your efficiency.

Start by planning your tasks. Organizing your work ahead of time can save you effort when completing it. Be aware of deadlines and leave room for any unexpected interruptions. Prioritize by focusing on what must be done today, what should be started today, and what can be handled later.

Make use of technology to work more efficiently. Tools like online calendars or smartphone apps can help you stay on track, but always be mindful of protecting patient health information.

If you're uncertain about which tasks to prioritize, consider discussing it with your supervisor. They can help you think through what's most time-sensitive, what requires attention soon, and what can be postponed.

It is most effective to focus on one task at a time to accomplish multiple responsibilities efficiently. Schedule more challenging tasks during the times of day when you are most productive. For instance, if you are more alert in the morning, plan to tackle difficult tasks then. Understand your personal work style and patterns to maximize your productivity. If you find that you work best in 30-minute intervals, organize your schedule around that. Take breaks as needed and leave some room for unplanned activities or tasks that may come up unexpectedly.

Depending on your resources, some Electronic Health Records or EHRs have features to help you keep track of your patients. Institutions use a variety of EHRs, including Epic, ARIA, Cerner and Mosaiq. Some institutions have developed a navigation note or documentation template to have a consistent way of documenting patient navigation in their EMR. Common softwares include OncoEMR (Flatiron Health), Varian, Oracle, and Member Care.

Some institutions create their own ways to share information through systems not specifically designed for navigation. Methods include documenting in SharePoint, Google calendar or custom systems created by a specific institution.

If you have the budget for navigation software, there are various options available to help you track your activities more effectively. Many of these tools are designed specifically for patient navigation and can streamline tasks such as tracking patient progress, keep track of patient barriers and interventions, managing care plans, and coordinating with healthcare teams. Some software options are clinically focused, while others can be customized for case management. Additionally, there are navigation tools tailored for financial navigation, helping to manage billing, insurance, and patient financial assistance.

One free option is the GW Patient Navigation Barriers and Outcomes Tool or PN-BOT (GW PN-BOT™). It is freely available and is based in excel. This is a free resource, and it does not come with ongoing technical support for the tool. However, you are able to adapt the tool as needed in partnership with IT support at your own institution. A link to PN-BOT can be found below this video.

If your institution does not have a lot of resources for your program, you are not alone! You can help organize yourself by adapting this Demographic Form available free of charge in English, Spanish and Chinese in the GW Cancer Center www.cancercontroltap.org Resource Repository. The link is available below this video.

This is a low-tech way to stay organized. The form is provided in the Resources Section of the training. Feel free to use this and change it to fit your institution.

We have been talking about building trust. What can you do to foster a trustworthy relationship with people and other healthcare professionals? One thing is being responsive to a person's needs in a timely fashion. We just went through strategies for using organizational skills, time management, problem solving, critical thinking and workload management to help you improve your responsiveness.

It is essential to perform your duties accurately and efficiently. Accuracy matters because often your hard work will impact that person's care trajectory. Efficiency is also important because with cancer care, time is important to improving outcomes, but also because resources for navigation are limited and you want to be able to help as many individuals as possible with your efforts.

For many patient navigators, most days filled with various activities. On any given day, this involves meeting with people, handling tasks such as calling insurance companies, documenting work using a spreadsheet, searching for resources, and communicating with colleagues and community members. Sometimes navigators do not always have control over when patients are seen, which can lead to feelings of being rushed and

overwhelmed. While there is a strong desire to help people, other duties can sometimes feel like they take away from that ability.

It can be helpful to make a plan to better manage the workload so you can be more responsive to both patients and other professionals.

- Make a list of goals for each day. This would be done every evening before leaving work, allowing the navigator to be prepared for the next day upon arrival.
- Collaborate with other teammates and navigators.
- Keep the office organized. With a constant flow of resources into and out of the office, it can be difficult to locate what is needed. The colleague shared an organizing system: keeping a list of frequently used resources on the desk for easy access, grouping other resources by topic in a cabinet, and keeping a full resource list visible on the wall as a reminder of what is available.
- Prioritize activities. Use timelines and urgency to determine what should be done first. While many tasks are important, they do not necessarily need to be completed immediately.
- Avoid overscheduling. Some navigators struggle with saying no, especially to patients, but navigators can help people more effectively when they are not overloaded with too many tasks. Urgent issues frequently arise, and having some flexibility in the schedule reduces stress and allows for more responsiveness.
- Communicate with the supervisor. Discussing concerns with your supervisor can help with task prioritization if you are concerned about having too many tasks or not meeting a deadline. It is always better to communicate early if more time is needed than to miss a deadline unexpectedly.

LESSON SECTION III

Feedback is a valuable tool that encourages the recipient to reflect on their performance and use the information to make improvements. It is used across various settings, including clinical, educational, and professional environments, to enhance performance, modify behaviors, and support professional growth. Feedback can be both informal, provided on a day-to-day basis, and formal, given as part of structured assessments.

In healthcare, feedback comes from multiple sources. Key sources include:

- Clinical/educational supervisors, who provide guidance and help monitor progress.
- Peers and colleagues, who offer feedback as part of a multidisciplinary team, often providing valuable insights on behavior and performance.
- Trainees, whose feedback is essential to improving the quality of training programs.
- Patients, who offer unique perspectives on the care they receive and the overall healthcare experience.

Feedback from these various sources helps healthcare professionals identify strengths and areas that need improvement, while also promoting reflective and experiential learning. It is a tool that supports both individual and team growth, contributing to the development of effective behaviors and enhancing overall care.

However, feedback must be delivered effectively. Poorly communicated feedback can negatively affect motivation and lead to a decline in performance. Constructive and well-delivered feedback, on the other hand, fosters learning and promotes positive behavior changes.

There are several barriers to providing effective feedback, particularly in a clinical setting. Recognizing and addressing these barriers is essential to ensure that feedback leads to positive changes:

- Generalized feedback that lacks specific details: Feedback should be related to clear, specific facts rather than vague statements. Without concrete examples, the recipient may become confused and suspicious of hidden agendas.
- Lack of advice on how to improve: Feedback is only helpful if it includes guidance on how to adjust behaviors or actions. Simply pointing out mistakes without providing suggestions for improvement can be demotivating.
- Fear of upsetting the recipient or damaging the professional relationship: Concerns about harming relationships can prevent individuals from giving honest feedback. Providing feedback in a supportive and respectful manner can help alleviate this fear.
- Resistance or defensiveness from the recipient: If the recipient becomes defensive, feedback may be disregarded. Handling these situations with empathy and patience is important to ensure the feedback is still constructive.
- Physical barriers: Giving feedback in noisy, inappropriate spaces can affect the message and make it feel less professional or even insulting. Ensure feedback is given in a private, calm, and respectful environment.
- Personal agendas: Feedback should never be influenced by personal biases. If there is a concern that personal agendas are affecting the feedback, it is better to pause and reflect before proceeding.
- Lack of respect for the source of feedback: Recipients are more likely to accept feedback from individuals they respect. If there is a lack of mutual respect, it may be helpful to ask a colleague with a stronger relationship to provide the feedback instead.

- Lack of confidence in providing feedback: Some may lack confidence when giving feedback, particularly if unsure how to approach the situation or if they struggle with assertiveness. Building confidence in giving feedback is important to ensure that the message is delivered effectively.

Addressing these barriers helps create an environment where feedback is more likely to be received openly and used constructively to improve performance and relationships.

There are several models of giving feedback, each suited to different situations. Let's explore a few key models and how they can be applied in clinical and professional settings.

1. The Feedback Sandwich

This model begins and ends with positive feedback, with areas for improvement placed in the middle. While it can be useful for everyday feedback, overusing this method may reduce its effectiveness, as recipients may begin to anticipate the "but" in the middle. It is important to offer positive feedback on its own when appropriate, so coworkers feel acknowledged and valued regularly. For example:

"You did a great job explaining the procedure to the patient and their family. To improve, you might also provide them with written information to help them retain key points. That said, your follow-up meeting gives you a perfect opportunity to answer any remaining questions and offer the materials."

2. Chronological Feedback

This model involves giving feedback in the order events occurred, allowing the learner to see a step-by-step breakdown of their performance. It works well for short feedback sessions, but in longer sessions, it can become bogged down by details. Here is an example:

"You did a great job introducing yourself to the patient. However, when you began the physical examination without getting consent, the patient seemed uncomfortable. Once you explained the procedure and obtained consent, the patient relaxed and the rest of the examination went smoothly."

3. Pendleton Model

This learner-centered approach fosters conversation and helps the individual reflect on their actions. It begins by asking the learner to highlight what they think went well, then moves into areas for improvement. This method encourages reflection and the creation of an action plan. It aims to prevent defensiveness by focusing on positives first and using open-ended questions such as:

- "What do you think went well?"
- "What do you think could be done differently?"
- "What could be further improved?"
- "How can this be achieved?"

By using these models, you can direct your feedback to different contexts and ensure that it is both constructive and supportive, helping the recipient grow and improve their skills.

When giving feedback, whether to a team member or a patient, it is important to keep in mind several guiding principles to ensure that the feedback is constructive and well-received.

1. Plan in advance.

Before giving feedback, take time to think about what you would like to achieve.

Reflect on the key points you want to address, including what went well and areas for improvement. Tailor the feedback to the individual and the situation rather than relying on a "one-size-fits-all" approach.

2. Be specific.

Effective feedback focuses on specific behaviors or actions. General feedback can be confusing and unhelpful. For example, saying, "I noticed you forgot to mention the local palliative care facility to your last patient. Did you provide them with the list of local resources?" is more helpful than, "You always forget to mention the local palliative care facility." Specific feedback helps guide improvements and is less likely to be taken personally.

3. Provide feedback promptly.

Feedback is most effective when given soon after the event, while the memory is still fresh. However, ensure you are providing it in a private, appropriate setting to avoid embarrassment or discomfort.

4. Start gently and encourage self-reflection.

Begin the conversation by asking the recipient how they feel about the situation or their performance. This encourages self-reflection and helps set a positive tone for the feedback. For example, ask, "How do you think that interaction went?" This approach allows the person to reflect on their own actions before you provide your observations.

5. Focus on key points.

Limit feedback to one or two important concepts. Providing too much information at once can overwhelm the recipient. Additionally, avoid bringing up past issues unless they are part of a larger pattern that needs to be addressed.

6. Be mindful of nonverbal communication.

Your body language, facial expressions, tone of voice, and eye contact are all important in conveying your message. Maintain an open and supportive posture, avoid distractions like looking at your phone or computer, and ensure that your nonverbal cues align with the constructive message you want to deliver.

7. Follow up.

After giving feedback, allow the recipient time to make adjustments and improve. Schedule a follow-up session to discuss any changes in behavior and assess whether the feedback has been applied effectively.

Incorporating these principles into your feedback process will ensure that it is constructive, encourages improvement, and maintains positive relationships.

Just as you will be giving feedback, you will also receive feedback from a variety of sources, including clinicians, supervisors, and patients. Receiving feedback effectively requires an open-minded and learner-centered approach. Here are some key principles to keep in mind:

1. Be a good listener.

When receiving feedback, focus on truly listening to what the person is saying. Avoid immediately preparing a response or defense. By actively listening, you show that you are approachable and open to learning.

2. Ask for clarification if needed.

If you are unsure of a point being made, ask for clarification. Restating the feedback in your own words can help ensure that you understand the message fully and are interpreting it correctly.

3. Embrace feedback as a learning opportunity.

Assume that feedback is constructive and designed to help you grow. Reflect on the feedback and consider how your actions impacted others. Even if the feedback feels critical, use it as a way to reflect and improve your performance.

4. Pause before responding.

Take time to process the feedback before responding. Avoid jumping to conclusions or reacting defensively. Pausing allows you to focus on the feedback and respond in a thoughtful and professional manner.

5. Stay open to suggestions.

Show that you are invested in the learning process and open to improving. If feedback is general or unclear, ask for examples or specifics to better understand how you can make adjustments.

6. Think positively and remain motivated.

Approach feedback with a positive attitude. Even if the feedback is challenging, use it as a way to learn from mistakes and grow. Ask for advice on how to modify your behavior and meet expectations.

7. Show appreciation.

Be respectful and thank the person providing the feedback. Acknowledging and appreciating their effort will encourage future feedback and build positive relationships.

8. Be proactive.

Act on the feedback you receive. Try out the suggestions, track your progress, and follow up with the person who gave the feedback to share how it helped. This shows that you are committed to improving and value the feedback process.

By following these principles, you can receive feedback in a way that is constructive, reflective, and ultimately beneficial to your personal and professional development.

Once you receive feedback, it is important to incorporate it into your daily work. Here are some tips to help with this process:

- Document areas for improvement. Write down specific points from the feedback, whether identified by you or others.
- Evaluate your routine. Identify where in your daily tasks you can apply the feedback and make adjustments.

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- Set reminders and action steps. Create reminders to focus on areas needing improvement and allocate time to address them.
- Plan for improvement. Schedule dedicated time to work on these changes and integrate them into your routine.
- Share progress. Regularly update colleagues or supervisors on your improvements and any progress made.

As you integrate feedback into your routine, you may also discover new goals to pursue.

LESSON SECTION IV

Patient navigators must be equipped to manage difficult situations while continuing to provide support to their patients. In this section, we will explore strategies for handling ambiguity, managing stress, and practicing self-care.

Ambiguity, or uncertainty, is a common part of most work environments. Often, decisions must be made without having all the necessary information. You may be asked to determine the best course of action to address barriers to care without fully knowing what your patient may need, or you could be given a task without clear instructions.

The key to managing this uncertainty is developing the skills needed to adapt to change and make informed decisions despite incomplete information. Those who are skilled in handling ambiguity know how to:

- Cope with and adapt to change
- Remain flexible and comfortable in uncertain situations
- Make decisions and act confidently without having all the facts
- Manage risks and uncertainty effectively

Finding the right balance is key. While flexibility is essential when decisions must be made with incomplete information, it is important to avoid making hasty decisions if more critical facts can be reasonably gathered. When possible, take the time to understand the problem to the fullest extent possible before acting. Additionally, avoid seeking out unnecessary risks when proven solutions are available. Flexibility is most valuable when immediate decisions are needed, and the future remains uncertain.

When faced with ambiguity, there are several effective steps you can take to manage uncertainty:

1. Create a visual representation. Use tools like a fishbone diagram to map out the cause and effect of the problem or process. Visualizing the issue can help you see connections and potential solutions more clearly.
2. Get organized. Write down what you know and document your assumptions. Outline the major tasks or deliverables you believe need to be completed. A Work Breakdown Structure can help break larger projects into smaller, more manageable steps.
3. Take incremental action. Start small, gather quick feedback, and make adjustments as you go. By taking small steps, you can make steady progress even in uncertain situations.
4. Dig deeper into the cause of the problem. Use tools like the 5 Whys technique to explore the root causes of an issue and uncover potential solutions.
5. Reflect on your emotional response. If you find yourself frustrated by change or overwhelmed by lack of clarity, your reactions may be counterproductive. Work on your emotional intelligence to manage these responses more effectively and maintain control.
6. Seek support. Do not hesitate to ask your supervisor or a colleague for guidance on how to navigate uncertainty.

By following these steps, you can build confidence in managing ambiguity and continue making progress, even in uncertain environments.

The nature of the work of patient navigation can at times be stressful. It's important for you to understand what stress is, the signs that stress is becoming negative and unhealthy, and how you can care for yourself to balance your stress levels.

Stress is the body's normal response to any demand, an outgrowth of the "fight or flight" response. Everyone experiences stress, so how you react to stress is what matters. Under stress, the body releases hormones, adrenaline, and hydrocortisone, which slow some functions, including our immune system, and turn on short-term energy reserves. After the stress is gone, the body returns to normal. Positive stress often stimulates necessary survival mechanisms and provides extra momentum and boosts productivity. Examples include preparing a lecture for a class, searching for a new home, or planning for a holiday.

Negative stress (distress) can either be acute (short-term) or chronic (long-term). Chronic stress leads to physical and mental dysfunction and disease. Stress management is how we can turn off the stress response and avoid the negative outcomes of chronic stress.

During sudden onset stress, muscles contract and then relax when the stress passes. However, during chronic stress, muscles in the body are often in a constant state of vigilance that may trigger other reactions of the body and even promote stress-related disorders. For example, tension-type headaches and migraine headaches are associated with chronic muscle tension in the area of the shoulders, neck, and head. Musculoskeletal pain in the lower back and upper extremities has also been linked to job stress.

Stress can manifest in various physical symptoms, which may feel exaggerated compared to how you normally experience them. These symptoms may include:

- Frequent illness: Chronic stress can weaken your immune system, leading to increased vulnerability to infections or illnesses. You may find yourself missing work or other commitments more often due to feeling unwell.
- Headaches and muscle tension: Prolonged stress can cause tension in your muscles, particularly in your shoulders, neck, and head, which may result in headaches or migraines.
- Changes in eating or sleeping habits: Stress can disrupt your usual patterns, causing you to eat or sleep more or less than usual. It may also trigger digestive issues such as diarrhea or constipation.
- Engaging in unhealthy behaviors: Stress can lead to turning to unhealthy coping mechanisms like smoking, excessive drinking, or overeating.
- Emotional symptoms: You might notice increased irritability, difficulty concentrating, or feeling overwhelmed. Crying more easily or for longer periods may also be a sign of stress.

It is important to address these symptoms before they lead to more serious issues. If you are concerned about how stress is affecting you, consider speaking with a mental health professional who can help you manage your stress and improve your well-being. Additionally, reaching out to your supervisor, human resources, or a trusted colleague may help you create a less stressful work environment. Support from friends, family, or mentors can also be invaluable during difficult times.

If stress is not managed effectively, it can progress into burnout, which may lead to more severe mental health concerns such as depression and anxiety, as well as physical health problems.

Burnout is the result of prolonged, cumulative stress from the demands of daily life, particularly in the work environment. It is characterized by physical, emotional, and

mental exhaustion, often caused by the depletion of one's ability to cope with the constant pressures of work. Burnout develops over time as a response to repeated, chronic stress and can manifest in several key ways:

- Emotional exhaustion: A loss of enthusiasm or energy for work.
- Depersonalization: Feelings of cynicism and detachment from colleagues and patients.
- Reduced personal accomplishment: A low sense of achievement and effectiveness in your role.

It is important to recognize the signs of burnout early and take steps to prevent it from worsening. Seeking support from colleagues, supervisors, or mental health professionals can be an important first step in managing burnout.

Compassion fatigue is a prevalent issue for oncology professionals, including patient navigators. It is a combination of burnout and secondary traumatic stress, which arises from the emotional strain of wanting to help individuals who are suffering. Compassion fatigue can severely affect both job performance and personal well-being, making it essential to recognize the signs early.

Some common symptoms of compassion fatigue include:

- Difficulty prioritizing or initiating routine tasks
- Difficulty with time management and/or frequent absenteeism or lateness
- Irritability, anxiety, or indecision
- Depression or feelings of hopelessness
- Lower sense of personal accomplishment, or irrationally high self-expectations
- Loss of initiative, energy, and self-care
- Less joy toward people or activities that once evoked happiness

- Exhaustion and physical symptoms, such as headaches, nausea, exhaustion, hypertension, frequent illnesses, gastrointestinal problems, and changes in eating or sleeping habits
- Substance abuse, such as using alcohol, drugs, or food to cope
- Loss of adaptability and inability to relax
- Preoccupation with minor issues or familiar tasks

Compassion fatigue not only impacts personal health but also contributes to job dissatisfaction, turnover, and even leaving the profession altogether. Building emotional resilience—such as the ability to bounce back from setbacks—plays a key role in warding off compassion fatigue. Taking time for self-care, seeking support, and maintaining a balanced perspective are essential steps toward preventing and managing compassion fatigue.

The World Health Organization (WHO) provides additional techniques for managing stress in their guide, *Doing What Matters in Times of Stress*. This guide outlines five categories of techniques that, even when practiced for just a few minutes each day, can help reduce stress levels. These categories include:

1. Grounding
2. Unhooking
3. Acting on values
4. Being kind
5. Making room

The link to this resource is available for your review in the Learning Management System below this video and it is available in various languages and audio versions.

Resilience is an important factor in avoiding burnout and compassion fatigue. It refers to the accumulation of skills, abilities, and knowledge that help individuals overcome adversity and manage challenges. Building emotional resilience allows patient navigators to replenish their emotional reserves and respond effectively to the emotional demands of their work.

As a patient navigator, it is important to recognize your own needs, as the work can be emotionally draining. Emotional resilience can help prevent burnout, but self-care is essential to maintaining both your emotional and physical health. Signs of burnout are not something to ignore but a call to take action.

Qualities of Emotional Resilience:

- Ability to self-calm
- Self-care practices
- Ability to self-replenish
- Emotional expressiveness
- Nonjudgmental/self-supporting mindset (lack of perfectionism)
- Optimism and hope
- Hardiness and a sense of coherence
- Strong social support network

When emotional resources are low, navigating work becomes even more challenging. Therefore, self-replenishing is key to building and maintaining resilience. Recognizing early signs of fatigue and taking proactive steps can help you avoid reaching a point of emotional exhaustion.

As stressful as the job can become, you should not let any aspect of their personal or professional life prevent you from taking care of what is a priority and maintaining

balance in their lives. Using self-care strategies can help you cope with stress and find the balance in your life again. This is not an exhaustive list of all self-care strategies, but these give you an idea of where to begin:

- Acknowledge and express emotions
- Practice self-care: exercise, get enough sleep, practice work-life balance, and follow a healthy diet
- Minimize life stress outside of work
- Recognize signs of compassion fatigue and burnout across multidisciplinary teams
- Seek mentorship and talk with coworkers after particularly challenging encounters
- Engage with counseling and behavioral resources as needed

While it is natural to seek comfort during stressful times, it is essential to avoid turning to harmful behaviors, such as substance use or habits that weaken self-control.

Acknowledging and processing emotions, rather than medicating them, is key to maintaining emotional resilience.

By prioritizing emotional self-care and cultivating resilience, you can better serve your patients while safeguarding your own well-being.

As oncology patient navigators, balancing the demands of your work with personal well-being is important. This wellness wheel illustrates a comprehensive approach to self-care, grounded in purpose. At the heart of this model is your purpose—your reason for doing what you do each day. In your role, your purpose might be helping people through their cancer journeys, advocating for their care, or navigating complex systems to remove barriers.

Every other component in this wheel supports that central purpose:

- **Natural Movement:** Staying physically active not only improves your health but supports your ability to fulfill your purpose each day, especially when dealing with demanding situations.
- **Environment:** Your work and personal environments can have a profound effect on how you carry out your responsibilities. Cultivating a workspace that supports focus and calm can help manage the intensity of your work.
- **Nutrition:** Just as you support people in finding the right care, supporting your body with proper nutrition ensures that you have the energy to do your best work.
- **Recharge:** This refers to ensuring you have enough time to rest, recharge, and maintain a healthy work-life balance. Regular rest is critical in avoiding burnout and keeping your emotional well-being intact.
- **Support & Belonging:** Feeling connected to your colleagues, patients, and community is important in sustaining your emotional resilience. Building a support network at work and outside of it helps maintain that sense of connection and reduces feelings of isolation.
- **Prevention:** Regular self-care, including stress management and attending to your mental and physical health, acts as preventive care to avoid burnout and compassion fatigue.

Supporting each of these pillars are self-care, clinical care, and community. As a patient navigator, just as you encourage your patients to access clinical care and stay connected to their communities, you should also prioritize these aspects for yourself. By fostering these habits, you create a solid foundation to continue fulfilling your purpose—supporting people through their cancer journeys.

You have reached the end of the Professional Development and Practice-Based Learning lesson, part of the Oncology Patient Navigator Training: The Fundamentals course. In this lesson, you learned how to:

- Identify sources of feedback for improving daily work and professional growth.
- Develop and implement strategies for giving, receiving, and using feedback constructively.
- Create professional development goals based on identified areas for growth.
- Develop and implement a professional development plan, including setting goals and finding opportunities to learn and improve.
- Describe and implement strategies for building trust, performing duties accurately, and managing work efficiently.
- Practice organizational, time management, problem-solving, and critical thinking skills to assist people effectively.
- Identify and use potential information technology tools to enhance efficiency.
- Identify and use tools for dealing with ambiguity and uncertainty in professional settings.
- Identify and implement self-care strategies for maintaining personal well-being.

Thank you for your participation in this lesson. Your continued growth as an oncology patient navigator is important to the care and support of those you serve. We hope the skills and strategies covered here will empower you to navigate the challenges of your role with confidence and compassion.