

## **10 Things You Should and Should Not Do as a Patient Navigator**

Welcome to the role of Patient Navigator. This role may put you in some situations surrounding transportation, money and your role as an advocate that you are unfamiliar with. You may ask yourself: Who am I to this person? How can I best relate to them to get them to trust me? Just be yourself and be kind and the rest will fall into place. Always do what is best for the patient and when you find yourself unsure of what to do, reach out to your team. Here are a few guidelines when working with your patients:

### **Do:**

1. Listen to their story. Pay attention to what they are saying and more importantly, what they don't say. Listen for expressions of fear and anxiety, and be wary of any potential mistrust towards you. Find out what their goals are. This is about them, not you.
2. Establish boundaries right away. Boundaries are a way to ensure the emotional and physical safety of both the patient and the navigator.
3. Follow up. After the first meeting, make sure you follow up within one week and check in frequently (at least every 2 weeks) until the goals are reached.
4. Get personal. Share surface level info but also try to relate in a deeper way.
5. Communicate openly and honestly. Your role as an advocate is critical to their success in meeting their goals. You are the gatekeeper of their trust into a system that may have let them down in the past. Establish realistic and reasonable goals; your work can solve some problems, but not everything. The measure of success is creating a sense that they have the ability to ask for what they need.

### **Don't:**

1. Don't drive your client to appointments or to grocery stores. Have them meet you there because it's a serious liability for them to get into your car.
2. Don't friend them on social media – this is a professional relationship; you may feel like they are your friend but unfortunately, they're not.
3. Don't give them money, even if they swear they will pay you back. Say "it's against our policy."
4. Don't lie. Don't give patients false reassurances or overpromise the world. State what you expect you can do, but also say that you're volunteering and you will try your best.
5. Don't hold onto your patient if you have nothing else to work on, and they've completed their goals. Let them go even if you have become attached.