Providing Novice Navigators With a GPS for Role Development: Oncology Nurse Navigator Competency Project

Lori McMullen, RN, MSN, OCN®, Teri Banman, RN, BSN, OCN®, Judy M. DeGroot, RN, MSN, AOCN®, Susan Scott, RN, BSN, OCN®, Dominique Srdanovic, RN, MA, OCN®, and Heather Mackey, RN, MSN, ANP-BC, AOCN®

Background: The care of patients with cancer has evolved to include various lay and professional roles to enhance care coordination with the focus on delivering patient-centered care. Oncology nurses in the role of oncology nurse navigators (ONNs) contribute to the delivery of patient-centered care by guiding patients and families through the cancer continuum and providing resources to overcome system and practical barriers and to enhance psychosocial support and cancer-specific education. However, the role of the ONN is often defined differently depending on the practice setting and institutional policy. The result is an inconsistent assortment of role functions and educational backgrounds.

Objectives: This article aims to promote standardization of the role of the ONN as well as the structure and boundaries of how ONNs function.

Methods: A project team was established by the Oncology Nursing Society to develop a professional practice framework and to identify core competencies for use by ONNs across a variety of practice settings.

Findings: The development of core competencies as well as examples of how the core competencies can be applied to ONN practice will help to define the ONN role and better serve the needs of patients with cancer, their families, and their caregivers.

The delivery of cancer care is evolving. Healthcare systems are introducing navigators to care teams in an attempt to reduce cancer mortality by improving access to quality cancer (Freeman, 2009) while acknowledging the need to fulfill American College of Surgeons Commission on Cancer (ACOS COC) and National Accreditation Program for Breast Centers standards for accreditation (ACOS, 2014; ACOS COC, 2012). In literature addressing the role of navigators in the oncology setting, navigators have been identified with a variety of titles: patient navigators, care navigators, professional nurse navigator, cancer care navigator, nurse navigator, and oncology nurse navigator (ONN), among others. This broad assortment of role titles is accompanied by an equally inconsistent assortment of role functions, educational backgrounds, and practice settings.

In 2009, the Oncology Nursing Society (ONS) recognized the distinctive function of the role of navigators with a think tank meeting. ONS joined with the Association of Oncology Social Work and the National Association of Social Workers to establish a joint position (ONS, 2010b). This position statement supported the importance of the patient navigator role (whether a layperson or professional) in the cancer care setting,
including the benefits oncology nurses and social workers bring to navigation.

In addition to the think tank, ONS launched a role delineation study in 2010 with the goal of defining the role responsibilities and knowledge necessary for competent job performance. Results from the study concluded that it was hard to delineate a distinction between the special skills, knowledge, and tasks of an ONN and an OCN®, further stating that a need existed for “additional initiatives to help define the role and competencies of the ONN” (Brown et al., 2012, p. 585). Based on these conclusions, feedback from the ONS Nurse Navigator Special Interest Group (NN SIG), and findings from the literature, the ONS Board of Directors formed a project team of ONNs and tasked them with the development of core competencies specific to ONN practice. Competencies are defined as a set of related skills, knowledge, abilities, and attributes needed to be successful in one’s work position (ONS, 2013). The ONN core competencies are focused on the necessary skill set and knowledge foundation that the novice ONN—an oncology nurse who has never practiced as a navigator—should possess or acquire during the first one to two years in their role.

Process of Competency Development

The ONN core competencies were developed using a multistep process that built on the work of previous competency development undertaken by ONS. A project team was assembled in August 2012 from members of the NN SIG who had responded to a call for volunteers and identified themselves as subject experts. The team members represented both tumor-specific and multi-site navigation from a variety of geographic locations across the United States. The five-member project team, in conjunction with an ONS project manager, began with a comprehensive literature review to examine, identify, and compare common competency themes and gaps. They also reviewed past ONS competency projects (ONS, 2007, 2008, 2010a, 2012) to gain an understanding of the scope and process involved in professional competency development. Once the literature review was complete, work began on the development of a clear definition of an ONN to differentiate an ONN from other lay and non-nursing professionals in the role of navigator (see Figure 1). The definition encompasses the specifics of who should fill the role as well as conveying the process the ONN uses to perform the role.

Additional literature was reviewed examining skill and knowledge requirements, job position descriptions, and the ACOS COC (2012) guidelines. The “Oncology Nurse Navigator Role Delineation Study: An Oncology Nursing Society Report” (Brown et al., 2012) was reviewed to solicit input about essential knowledge, skills, and expertise required of an ONN in a variety of settings. This information was used to establish a draft of 47 ONN professional core competencies organized by four categories: professional role, education, coordination of care, and communication.

To validate the competencies, NN SIG members, as well as any ONS member who reported their primary work function to be nurse navigation, were invited to take part in the field review for a total of 486 invitees. From this group, 189 responses were returned with 142 complete and included for evaluation. This represented a 29% return rate from the original invited group. The responses represented all regions of the country and a wide variety of practice settings. Diversity existed among the field reviewers in education level, years of practice as a nurse, and tumor sites navigated. Participating field reviewers provided input on the clarity of the draft competency statements, whether these behaviors and skills were core to the ONN role, and whether they were appropriate for a novice navigator. Participants also provided input on whether each competency should be included in the final ONN core competencies document and made suggestions on additional competencies that might be included. The list of core competencies was then refined to clarify individual statements, reduce redundancy, and eliminate competencies deemed beyond the scope of novice ONNs.

The final step in the competency development process was conducted by 10 expert reviewers who were identified based on their years of experience and leadership role in oncology nurse navigation. They provided input on the flow, clarity, completeness, and appropriateness of the overall competencies, as well as provided feedback on individual statements. Based on their input, additional edits were made and the final list of 40 core competencies was produced to define the role of the ONN (see Figure 2).

Professional Practice Framework

In conjunction with the development of the core competencies, the project team created a professional practice framework as a schematic that visually articulates the systems, functions, and delivery of ONN practice (see Figure 3). The professional practice framework resulted from central themes and concepts that were revealed during the literature review. Professional nursing practice models are defined as systems that support RNs’ control over the delivery of nursing care and the environment in which that care is delivered (Hoffart & Woods, 1996). The framework demonstrates professional elements and relationships that guide ONN role function and serves as a foundation of behaviors to complement the development of the functional areas (professional role, education, coordination of care, and communication), specific skills, and knowledge of the ONN core competencies.

---

**Oncology nurse navigator (ONN):** An ONN is a professional RN with oncology-specific clinical knowledge who offers individualized assistance to patients, families, and caregivers to help overcome healthcare system barriers. Using the nursing process, an ONN provides education and resources to facilitate informed decision making and timely access to quality health and psychosocial care throughout all phases of the cancer continuum.

Lay navigator: A trained nonprofessional or volunteer who provides individualized assistance to patients, families, and caregivers to help overcome healthcare system barriers and facilitate timely access to quality health and psychosocial care from prediagnosis through all phases of the cancer experience.

**FIGURE 1. Navigator Role Definitions**

*Note:* Based on information from Oncology Nursing Society, 2010b.
Competency Category 1: Professional Role

The ONN demonstrates professionalism within both the workplace and community through respectful interactions and effective teamwork. He or she works to promote and advance the role of the ONN and takes responsibility to pursue personal professional growth and development. The ONN

- Promotes lifelong learning and evidence-based practice, by self and others, to improve the care of patients with a past, current, or potential diagnosis of cancer
- Demonstrates effective communication with peers, members of the multidisciplinary healthcare team, and community organizations and resources
- Contributes to the knowledge base of the healthcare community and in support of the ONN role through activities such as involvement in professional organizations, presentations, publications, and research
- Contributes to ONN program development, implementation, and evaluation within the healthcare system and community
- Disseminates knowledge of the ONN role to other healthcare team members through peer education, mentoring, and preceptor experiences
- Obtains or develops oncology-related education materials for patients, staff, and community members, as appropriate
- Participates in the tracking of metrics and patient outcomes, in collaboration with administration, to document and evaluate outcomes of the navigation program and report findings to the cancer committee
- Collaborates with the cancer committee and administration to perform and evaluate data from the community needs assessment to identify areas of improvement that will affect the patient navigation process and program and participate in quality improvement based on identified service gaps
- Promotes a patient- and family-centered care environment for ethical decision making and advocacy for patients with cancer
- Establishes and maintains professional role boundaries with patients, caregivers, and the multidisciplinary care team in collaboration with the manager as defined by job description
- In collaboration with other members of the healthcare team, builds partnerships with local agencies and groups that may assist with patient care, support, or educational needs.

Competency Category 2: Education

The ONN provides appropriate and timely education to patients, families, and caregivers to facilitate understanding and support informed decision making. The ONN

- Assesses educational needs of patients, families, and caregivers taking into consideration barriers to care (e.g., literacy, language, cultural influences, comorbidities)
- Provides and reinforces education to patients, families, and caregivers about diagnosis, treatment options, side effect management, and post-treatment care and survivorship
- Educates patients, families, and caregivers about the role of the ONN
- Orient and educates patients, families, and caregivers to the cancer health-care system, multidisciplinary team roles, and available resources
- Promotes autonomous decision making by patients through the provision of personalized education and support
- As part of the multidisciplinary team, provides education and reinforces to patients, families, and caregivers the significance of adherence to treatment schedules, protocols, and follow-up
- Assess and promotes healthy lifestyle choices and self-care strategies through education and appropriate referrals to ancillary services
- Provides anticipatory guidance, education, and appropriate referrals to assist patients in coping with the diagnosis of cancer and its potential or expected outcomes
- Promotes awareness of clinical trials to patients, families, and caregivers.

Competency Category 3: Coordination of Care

The ONN facilitates the appropriate and efficient delivery of healthcare services, both within and across systems, to promote optimal outcomes while delivering patient-centered care. The ONN

- Assesses patient needs at the initial encounter and periodically throughout navigation, matching unmet needs with appropriate services and referrals and support services, such as dietitians, providers, social workers, and financial services
- Identifies potential and realized barriers to care (e.g., transportation, child care, elder care, housing, language, culture, literacy, role disparity, psychosocial, employment, financial, insurance) and facilitates referrals as appropriate to mitigate barriers
- Develops and uses appropriate assessment tools (e.g., pain scale, fatigue scale, performance status) to promote a consistent, holistic plan of care
- Facilitates timely scheduling of appointments, diagnostic testing, and procedures to expedite the plan of care and to promote continuity of care
- Participates in coordination of the plan of care with the multidisciplinary team, promoting timely follow-up on treatment and supportive care recommendations
- Facilitates individual care within the context of functional status, cultural consideration, health literacy, and psychosocial and spiritual needs for patients, family, and caregivers
- Demonstrates knowledge of clinical guidelines (e.g., National Comprehensive Cancer Network, American Joint Committee on Cancer) and specialty resources (e.g., Oncology Nursing Society Inner Evidence Into Practice resources) throughout the disease process
- Assists in the identification of candidates for genetic counseling and facilitates appropriate referrals
- Supports a smooth transition of patients from active treatment into survivorship or end-of-life care
- Uses an ethical framework regarding patient care to assist patients with cancer with issues related to treatment goals, advance directives, palliative care, and end-of-life concerns
- Ensures documentation of patient encounters and provided services
- Applies basic knowledge of insurance processes (e.g., Medicare, Medicaid, third-party payers) and their impact on staging, referrals, and patient-care decisions toward establishing appropriate referrals, as needed.

Competency Category 4: Communication

The ONN demonstrates interpersonal communication skills that enable an exchange of ideas and information effectively with patients, families, and colleagues at all levels. This includes writing, speaking, and listening skills. The ONN

- Builds therapeutic and trusting relationships with patients, families, and caregivers through effective communication and listening skills
- Acts as a liaison between the patients, families, and caregivers and the providers to optimize patient outcomes
- Advocates for patients to promote optimal care and outcomes
- Provides psychosocial support to and facilitates appropriate referrals for patients, families, and caregivers, particularly during periods of high emotional stress and anxiety
- Empowers patients and families through education and encouragement to self-advocate and communicate their needs
- Adheres to established regulations concerning patient information and privacy
- Ensures that communication is culturally sensitive
- Facilitates communication among members of the multidisciplinary cancer care team to prevent fragmented or delayed care that could adversely affect patient outcomes.

FIGURE 2. Oncology Nurse Navigator (ONN) Core Competencies

At the core of the framework are the intersecting circles representing the operational domains of the patient and the healthcare system; the ONN works for and within both systems (Fillion et al., 2012). The ONN works to influence positive patient outcomes, promoting patient-centeredness, while simultaneously promoting positive system outcomes through coordination of care and fluid communication pathways between the patient, the cancer care team, and collaborating providers, while remaining fiscally responsible to the organization (McMullen, 2013). Encircling the core is the domain of functional behaviors key to the role of the ONN. Synergy is present in this domain as the four behavioral components often work in conjunction with each other. For example, the ONN facilitates care when assessing and identifying barriers to care, initiates an action plan to mitigate the barrier, which might include acting as an advocate for the patient, and then evaluates and communicates the outcome, all within the context of cultural sensitivity.

The outer ring of the framework guides delivery of ONN care using the nursing process: assess, plan, implement, and evaluate. This feature is distinctive for the ONN professional practice framework and what distinguishes a nurse in the role of navigator from a lay navigator or a social work navigator.

Dissemination and Application of Competencies

The ONS ONN core competencies have been disseminated in several formats with their original publication released online by ONS in November 2013 (ONS, 2013). The competencies were presented as a poster presentation to the 2013 ACOS COC Spring Meeting (McMullen et al., 2013), as a poster presentation to the Academy of Oncology Nurse Navigators (McMullen et al., 2013), as a podium presentation at the 2014 ONS Congress (DeGroot & McMullen, 2014), through the newsletter of the NN SIG (McMullen, 2014), and as part of an abstract session on models of care delivery at the 2014 International Society of Nurses in Cancer Care 18th International Conference in Cancer Nursing (Barton-Burke, 2014). The competencies have been included in ONS’s textbook on oncology nurse navigation, Oncology Nurse Navigation: Delivering Patient-Centered Care Across the Continuum (Blaseg, Daugherty, & Gamblin, 2014), which states that the goal of the taskforce was to create a “comprehensive, competency framework, inclusive of initial assessment of competencies, as well as ongoing assessment to ensure that navigators are qualified and safe in performing assigned duties” (pp. 30–31).

On the front line of patient care, ONNs have the professional responsibility to disseminate the core competencies to their ONN peers and ONN managers. When developing and implementing the role of the ONN in an oncology program, the ONN core competencies should be used as a key document in outlining the role of the ONN within the cancer program, developing job descriptions, and using the competencies in the selection of potential ONNs. As an ONN program matures, the ONN core competencies also can be used as a means of evaluating the ONN program and identifying potential ongoing and future program development goals.

These competencies can be used in many ways (ONS, 2010a, 2013), including, but not limited to:

- Assist an organization in the identification of resources that may be needed to help novice ONNs mature professionally and be successful in their role.
- Assist in the recruitment of oncology nurses with the qualifications and skills delineated in the ONN competencies.
- Assist with job description development.
- Improve retention of ONNs as the result of clearer definition and expectations of the role.
- Assist with the identification of ONN strengths and professional development needs.
- Assist managers in developing performance expectations and evaluations for ONNs.
- Use to establish performance and developmental goals with the ONN.
- Assist in the development of orientation program and competency checklists for a novice ONN.
- Use as a guide for the preceptor of a novice ONN.
- Assist managers, who may have a broad variety of professional backgrounds, in the overall evaluation of the ONN program.
- Assist in the promoting and education of the role of the ONN in the professional community and community at large.
- And, eventually, develop an ONN certification process.

The ONN competencies outline the knowledge, skills, and expertise required for novice ONNs to enhance the coordination of care for patients with cancer, help the patients, families, and caregivers to overcome healthcare system barriers, and provide education and resources to facilitate informed decision making and timely access to health and psychosocial

---

**FIGURE 3. Oncology Nurse Navigator Professional Practice Framework**

care throughout all phases of the cancer continuum. Features of ONN practice are the ability to deliver care using the steps of the nursing process: assessment, planning, implementation, and evaluation. The ONN demonstrates the functional behaviors to educate, facilitate, and advocate in a culturally sensitive setting. The ONN must function within the healthcare system to deliver care to the patient, and through quality measures and recognizing organizational and community barriers to care, work within that system to change the navigational path of the patient to facilitate better and faster quality patient care across the continuum.

Limitations of the Competencies

Several challenges arose during the development of these competencies, which highlights their limitations. Keeping in mind that the goal of the ONN project team was to offer standardization to the role of the ONN and to promote structure and boundaries to how ONNs function, it was important that the competencies were broad to allow for application across diverse settings. The field review responses revealed that ONNs have varied experiences and educational preparations. ONNs operate differently across geographic and institutional settings; some ONNs are tumor specific, such as lung or genitourinary navigators, whereas others navigate all tumor sites. Those who practice in larger academic or National Cancer Institute–designated centers have the advantage of access to multidisciplinary and community resources, such as on-site social work and psychosocial providers, financial counselors, and the convenience of mass transit systems that addresses transportation barriers. ONNs in community or rural areas may have a limited or no multidisciplinary team and few community resources. In addition, orientation and role development of ONNs is not standardized. Although large academic centers may have several navigators with the ability to mentor a novice ONN, in smaller and community organizations the ONN must learn on the job without the benefit of a mentor. The result is often that new ONNs must bear the responsibility for identifying their baseline knowledge and skill level, recognizing professional development needs, and locating resources to meet those learning needs. The final core competency product offers a broad set of skills and knowledge to support a novice ONN in most clinical settings.

There are limitations to the competencies. They were developed and vetted by nurses to reflect the knowledge and skills unique to oncology nurses in the role of navigator; therefore, they are not applicable to non-nurses in navigation roles. In addition, all 40 competencies may not apply in every setting. Navigation programs are unique. Broad role functions of ONNs are operationalized according to their institutions; therefore, ONNs may have additional tasks or job requirements, such as coordinating a tumor board or completing financial aid forms, in addition to the four competency functional areas identified by the ONN core competencies.

Conclusion

Competencies help to keep the individual and group focused on the mission, philosophy, and goals of the organization, and how one can contribute to the achievement of the organization’s mission and goals (Wright, 2005). Competencies should encourage personal accountability with a focus on quality outcomes and patient needs. The role of the ONN has evolved and will continue to change and adapt as the healthcare environment changes. The ONN core competencies presented here add another layer to the foundation ONS has set with the think tank and role delineation study as the organization works to support and promote the work of ONNs.

The process to identify ONN core competencies and behaviors was supported by evidence-based practice and validated by a consensus-driven peer-review process. The professional practice framework highlights a bi-dimensional accountability because the ONN not only promotes timely access to care (Desimini et al., 2011; Fillion et al., 2012; Wilcox & Bruce, 2010), but also supports improved care coordination through communication and continuity of cancer services across the organization for patients, the cancer care team, and the healthcare system. The ONN core competencies will provide novice ONNs who practice across multiple tumor sites, patient populations, or healthcare settings, as well as their employers, with the foundational concepts to establish and grow programs by supporting the functional role and job responsibilities that are determined by the needs of the patient, the community, and the organization (Pedersen & Hack, 2010; Wilcox & Bruce, 2010).

Competencies also will evolve over time as the healthcare environment and organization change to meet the needs and demands of the patients (Wright, 2005). Regardless of training, competencies grow through experiences and the ability to use training, knowledge, and critical thinking skills to develop, learn, and adapt in complex, dynamic, and unpredictable clinical environments.

The authors gratefully acknowledge the oncology nurse navigator core competency expert reviewers: Karyl Blaseg, RN, MSN, OCN®; Marie Borsellino, RN, BSN, OCN®; CBNP-C; Carol J. Bush, BS, RN, Ellen Carr, RN, MSN, AOCN®, Diane McElwain, RN, OCN®, M.Ed., Britta Newcomer, RN, BSN, OCN®, Karen Overmeyer, MS, RN, APRN-BC; Jean B. Sellers, RN, MSN, Patricia Strusowski, MS, RN, and Donna Moore Wilson, BSN, RN, CBCN®.

References


