

2017 Oncology Nurse Navigator Core Competencies



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Key Terms Used in Competencies

Oncology nurse navigator: An oncology nurse navigator (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 (Oncology Nursing Society [ONS], 2010).

Novice ONN: A nurse who has worked two years or less in the ONN role and is building upon his or her academic preparation, nursing knowledge, and oncology navigation experience to develop in the ONN role.

Expert ONN: An ONN who has worked at least three years, is proficient in the role, and has the education and experience to use critical thinking and decision-making skills pertaining to the evolution of navigation processes and the individual ONN.

Purpose of Competency Development

Core competencies refer to a specific area of expertise that is vital to performing in a role (National Institute of Standards and Technology, 2015). In 2011, ONS recognized that a growing number of oncology nurses identified ONN as their primary role function. Supported by data collected in the ONS Nurse Navigator Survey, the first ONN role delineation study (RDS) (Brown et al., 2012), and anecdotal information from the ONS Nurse Navigator Special Interest Group (SIG), ONS identified the need to clearly define the role of the ONN, as well as support growth and standardization of the role. This need led to the ONS Board of Directors' plan for the development of the initial ONN competencies (ONS, 2013).

In 2015, the ONS Nurse Navigation SIG leadership team collaborated with the ONS Board of Directors to compose a position statement. The *ONS Position on The Role and Qualifications of the Oncology Nurse Navigator* highlights the ONN role in supporting organizational strategies across the cancer care continuum, necessitating the ONN to master knowledge, skills, and tasks that allow him or her to influence network sys-

tems and behaviors, community needs assessment, navigation program development, marketing and outreach, understanding and use of ONN-specific outcomes metrics, and identification of gaps in and strategies to meet continuum-based needs. In addition, cancer survivorship planning is increasingly a component in the navigator role expectations (Lubejko et al., 2016; ONS, 2015).

As ONS continues work to refine and support the role of the ONN, a second RDS was conducted in 2016 to determine whether the ONN role was changing and whether there was sufficient information to support the development of an ONN certification examination. Findings of this RDS (Lubejko et al., 2016) revealed that, while the knowledge needed for each role are similar, differences exist between the focuses of the clinical oncology nurse and ONN roles.

The practice focus of the ONN is on education and coaching of colleagues about the navigation role, collaboration to identify and learn best practices, marketing, and population and systems-level tasks (Lubejko et al., 2016). The RDS revealed that, although care coordination is an integral component of oncology nursing in general, the clinical or staff nurse usually focuses on meeting patients' clinical needs in one setting, whereas the ONN most often provides care coordination, guidance, education, and advocacy across care settings (Lubejko et al., 2016). Also in 2016, the name of the ONS Nurse Navigation SIG was broadened to the Navigation and Care Coordination Community to acknowledge and highlight that care coordination is a key component of the ONN role.

Based on the RDS results and feedback from ONS membership, a process was initiated to evaluate and update the ONN core competencies developed in 2013. The ONN competencies are meant to reflect practice across most settings with consideration of the context of the individual navigation program.

Definition of Oncology Nurse Navigator Core Competencies

The ONN competencies outline the fundamental and advanced knowledge, skills, and expertise needed to effectively (a) coordinate the care of patients with a past, current, or potential diagnosis of cancer; (b) assist patients with cancer, families, and caregivers to overcome healthcare system barriers; and (c) provide education and resources to facilitate informed decision making and timely access to quality health and psychosocial care throughout all phases of the cancer care continuum (CCC).

Process of Competency Development

ONS uses a multi-step process that starts with a literature review and expert opinion to identify and compare common competency themes and gaps and develop a preliminary list of competencies. The draft competencies are then vetted through field and expert review. This process is unchanged for the updated ONN core competencies.

Before beginning the process of updating the competencies, a project team was identified. The project team included six ONS members and two ONS staff. The ONS members were chosen because of their expertise related to the ONN role in a variety of settings and areas of the country. They were also chosen because of their demonstrated leadership abilities.

Early in the process of ONN competency review, the project team noted that most nurses currently in oncology navigation roles bring extensive oncology nursing experience and a growing number have lengthy experience in navigation. The data indicated the need to recognize progression in the knowledge, skills, and tasks—the competencies—that differentiate novice and experienced or expert ONNs. A progression in the current ONN core competency structure to include a category detailing expert ONN core competencies was included in the process of competency development and vetting.

Step 1: Develop List of Core Competencies

The literature review included publications from 2013–2016 and focused on skill and knowledge requirements, position descriptions, and the American College of Surgeons Commission on Cancer (2016) guidelines. In addition, the project team reviewed current ONS competency documents—the Oncology Clinical Trials Nurse Competencies, the Oncology Clinical Nurse Specialist Competencies, the Oncology Nurse Practitioner Competencies, and the Leadership Competencies (ONS, 2007, 2008, 2012, 2016)—to review the scope and process involved in professional competency development. It was also pertinent that the project team reviewed the 2016 ONN RDS. This study evaluated the nursing tasks that are more often the responsibility of the ONN as opposed to the clinical/staff oncology nurse (Lubejko et al., 2016).

A brainstorming session resulted in revisions to the key terms used to define navigators in the 2013 document: ONN, lay navigator and novice navigator. Based on the evidence and Benner's (1984) theory *From Novice to Expert: Excellence and Power in Clinical Nursing Practice*, the project team added “proficient” ONN to the list of key terms used to define types of navigators. Ultimately, proficient was changed to “expert” to align with the recommendations of the expert reviewers.

The definition of a novice ONN remains unchanged from the original competencies.

An oncology nurse navigator is a professional registered nurse with oncology-specific clinical knowledge who offers individualized assistance to patients, families, and caregivers to help overcome healthcare system barriers. Utilizing the nursing process, an oncology nurse navigator 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 (ONS, 2013).

Having a clear definition of an ONN allows for a uniform understanding of who fills the role of ONN and differentiates the ONN from the lay navigator.

A definition for an expert ONN was added:

An ONN who has worked at least three years, is proficient in the role and has the education and experience to use critical thinking and decision-making skills pertaining to the evolution of navigation processes and the individual ONN.

The 2013 project team divided the knowledge base and function of the ONN into four categories: professional role, education, coordination of care, and communication. The categories were reordered by the 2016 project team to coordination of care, communication, education, and professional role to highlight the operational focus of the ONN.

After review of the 2013 competencies, the literature and their knowledge of the ONN role, the project team agreed on 42 novice ONN competencies and 9 expert ONN competencies, for a total of 51 competencies. The expert competencies were added to demonstrate an advanced level of knowledge of ONN practice, process improvement, decision making, and critical thinking skills.

The ONN professional practice framework, originally developed by the 2013 project team, was enhanced to reflect the core competency categories within the first circle of ONN practice. In addition, because of the complexity and durability of the ONN role across the cancer continuum, the project team added an ONN care model. This model will be discussed later in this document.

Step 2: Field Review

To validate the revised competencies, a field review was then conducted. Field reviewers were asked to comment on clarity and accuracy of the key definitions of a navigator and if the list of requirements were appropriate for an ONN. The field

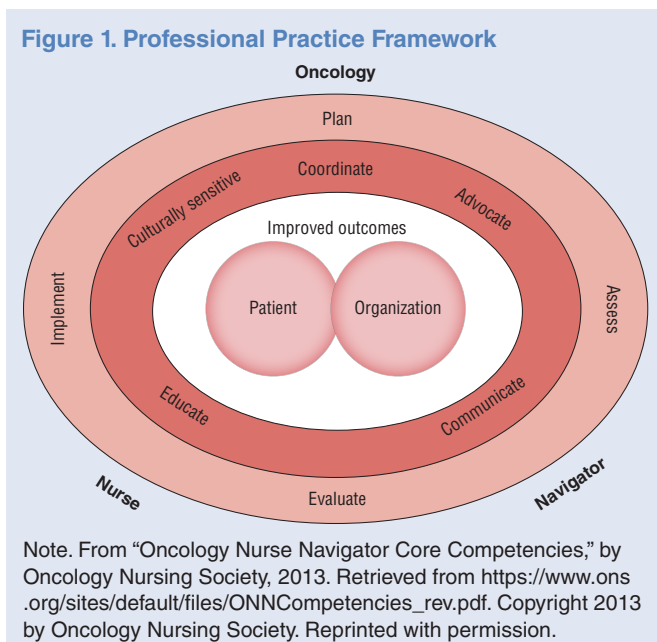
reviewers were then asked to comment on whether each novice and proficient competency should be included in the final ONN core competencies document and to make suggestions on competencies that might be included.

The field review survey was sent to all ONS Nurse Navigator SIG members, as well as all ONS members who reported their primary work function to be nurse navigation, for a total of 5,137 nurses. A total of 148 responses were received. The responses represented all regions of the country and a wide variety of practice settings. Participants reflected diversity in educational levels, years of practice as a nurse, and tumor sites navigated.

Based on field review ratings and individual comments, edits were made to the key definitions of the ONN, initial requirements for an ONN, as well as novice and expert competencies. The edits were made to reduce redundancy, clarify competencies, and appropriately classify novice and expert competencies: one novice competency was moved to the expert category and two additional expert competencies were created for a total of 53 competencies.

Step 3: Expert Review

Twelve expert reviewers were identified and agreed to complete a review of the ONN core competencies. These experts were chosen based on their years of experience and leadership roles in ONN. The expert reviewers were asked to comment on the flow, clarity, completeness, and appropriateness of the overall novice and expert competencies, as well as to provide feedback on individual statements. Based on their feedback,



additional edits were made and a final count of 53 core competencies was finalized: 41 novice and 12 expert.

To provide a foundation for ONNs and to clearly portray where the ONN role fits within their organization and with their patients, the ONN Project Team relied on their extensive review of the literature to develop an organizing framework for the ONN. The framework articulates ONN practice and role function, thereby providing support for the development of the competencies (see Figure 1). The defining feature for the ONN is the ability to deliver care using the steps of the nursing process: assess, plan, implement, and evaluate. In practice, the ONN demonstrates the functional skills to coordinate, communicate, educate, collaborate, and advocate, all within the context of cultural sensitivity. The core of the framework, and key element in understanding the function of the ONN, is the concept of working for and within two operational domains: the patient and the healthcare system. The ONN works to influence positive patient outcomes but also to promote positive system outcomes through improved interdisciplinary communication, patient retention, and downstream revenues (Desimini et al., 2011; Fillion et al., 2012).

Applicability and Dissemination

The intent of the development of these core competencies was to assist with refining the role of the ONN based on published evidence. However, because the ONN can function in any or all phases of the cancer continuum, it can be difficult to visualize where the ONN can have an impact on patient care and outcomes. To more clearly depict the broad impact of the ONN, an Oncology Nurse Navigation Care Model (ONNCM) was developed to visually represent how an ONN can affect each phase of the CCC (see Figure 2). These phases are well defined in the literature and include: prevention and screening, diagnosis, treatment, survivorship, and end-of-life care (Levit, Balogh, Nass, & Granz, 2013). The ONN competency project team added advanced and metastatic cancer as an additional phase where an ONN can continue to guide and support patients. Feedback requested during field and expert review supported the clarity and accuracy of the ONNCM.

Scope of ONN Practice

Oncology survivors do not necessarily move in a linear fashion through the phases of the CCC. Therefore, ONN interventions are portrayed as encircling the phases of the CCC. The ONN care model depicts ONN interventions in a broad sense in each of the following categories.

- **Assess and address barriers to care:** Barriers to quality cancer care differ among diagnoses, phase of the CCC, and from

patient to patient. The role of the ONN is to carefully assess patients for their unique barriers and to address those barriers in an individual way.

- **Provide education, resources, and referrals:** Providing education, resources, and referrals to local and national resources (i.e., physical/occupational therapy, dietitians, home health, financial counselors, and foundations) are at the heart of the ONN role.
- **Facilitate shared decision making:** Shared decision making involves ensuring that patients are fully informed of risks and benefits of treatment options and that their values and preferences are integrated into treatment decisions (Katz, Balkora, & Elwyn, 2014). The ONN can facilitate shared decision making and engage patients in their care by forming trusting relationships and addressing patients' communication and health literacy needs at all phases of the CCC.
- **Promote advance care planning:** The ONN can promote advance care planning by encouraging patients to talk about their treatment wishes and overall goals of care. The ONN can help patients formulate questions to discuss with their healthcare providers
- **Support palliative care:** The ONN can support patients' use of palliative care services by assessing for late and long-term side effects and other physical barriers to patients' quality of life. The ONN can also be instrumental in helping patients understand the difference between palliative care and hospice.

In addition, because the role of the ONN is operationalized differently across institutions, the competencies are intended to provide a basic framework for the ONN role and responsibilities. The competencies can be used in many ways, including but not limited to the following (McMullen et al., 2016):

- Developing the role of the ONN
- Assist with job description development.
- Providing managers with information to successfully screen applicants for ONN positions
- Developing orientation programs
- Providing guidance for preceptorship of new ONNs
- Developing competency checklists
- Contributing toward the evaluation of a navigation program
- Promoting the role of the ONN
- Assist an organization in the identification of resources that may be needed to help novice ONNs mature professionally and be successful in their role.
- 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.
- Use to establish performance and developmental goals with the ONN.

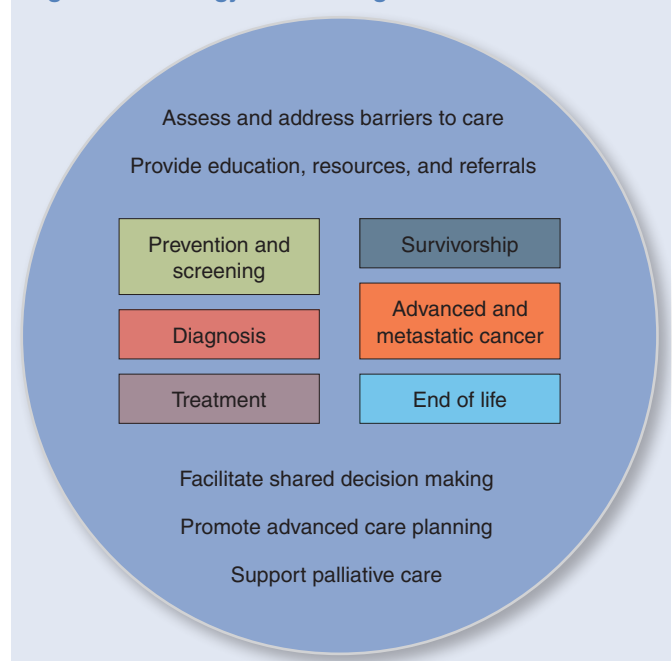
- Assist managers, who may have a broad variety of professional backgrounds, in the overall evaluation of the ONN program.
- Assist in the promoting and education of the role of the ONN in the professional community and community at large.

Knowledge and Skills Requirements for the ONN

The ONN plays a vital role in achieving successful outcomes for patients with cancer and their families/caregivers. Research has clearly shown improved patient outcomes that resulted from the presence of an ONN (Case, 2011). To achieve successful patient outcomes, the ONN must possess a certain skill set. If the ONN does not possess this knowledge and skill set initially, engagement in professional development opportunities would be beneficial. These skills may include but are not limited to,

- Strong oncology knowledge. Certifications like OCN®, AOCN®, AOCNS®, AOCNP®, and CHPON® all demonstrate specific knowledge of cancer care for a specific patient population (i.e., adult or pediatric). Additional certifications, such as CBCN® and BMTCN®, speak to the unique care needs and requirements of even more specific patient populations and may be beneficial for ONNs working in those sub-specialties.
- Basic knowledge of insurance reimbursement systems
- Working knowledge of financial hardships and payer coverage
- Working knowledge of national, regional, and community resources
- Knowledge of self-care strategies and resources
- Critical-thinking skills
- Strong leadership skills

Figure 2. Oncology Nurse Navigation Care Model



- Strong interpersonal skills
- Ability to develop collaborative relationships both internally and externally
- Ability to work in teams
- Ability to work autonomously
- Strong verbal and written communication skills
- Strong organizational skills
- Ability to prioritize and reprioritize quickly
- Basic computer skills

Summary

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 ONN 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 communication and continuity of cancer services across the organization for patients, the cancer care team, and the healthcare system. The ONN Care Model provides a visual expression of how an ONN can affect each part of a patient's cancer journey. The competencies outlined in this document will provide novice and expert ONNs, practicing across any tumor site, patient population, or healthcare setting, as well as their employers, foundational concepts to establish and expand programs by supporting the care coordination, 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).

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Competency Statements: Introductory Statement

The oncology nurse navigator (ONN) demonstrates critical thinking and uses the nursing process to assess and meet the needs of patients and their families/caregivers by providing care coordination throughout the cancer continuum. The ONN works between the domains of the patient and family unit and the healthcare delivery system to improve health, treatment, or end-of-life outcomes. This is accomplished through competent practice in the following functional areas.

Competency Category 1: Coordination of Care

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

Novice ONN

Assesses patient needs upon initial encounter and periodically throughout navigation, matching unmet needs with appropriate services and referrals and support services, such as palliative care, dietitians, medical providers, social work, pre/rehabilitation, and legal 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 knowledge of available local, community, or national resources and the quality of services provided; also establishes relationships with the providers of these services

Develops or uses appropriate screening/assessment tools and methods (e.g., Distress Thermometer, pain scale, fatigue scale, performance status, motivational interviewing, financial) 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 (e.g., cancer conferences/tumor boards)

Facilitates individualized care within the context of functional status, cultural consideration, health literacy, psychosocial, reproductive/fertility, and spiritual needs for patients, families, and caregivers

Applies knowledge of clinical guidelines (e.g., National Comprehensive Cancer Network, American Joint Committee on Cancer) and specialty resources (e.g., ONS Putting Evidence into Practice resources) throughout the cancer continuum

Assists in the identification of candidates for molecular testing and/or genetic testing and counseling, and facilitates appropriate referrals

Supports a smooth transition of patients from active treatment into survivorship, chronic cancer management, or end-of-life care

Assists patients with cancer with issues related to treatment goals, advance directives, palliative care, and end-of-life concerns using an ethical framework that is nonjudgmental and nondiscriminatory

Ensures documentation of patient encounters and provided services

Applies 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 2: Communication

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

Novice 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 outcomes
- Advocates for patients to promote patient-centered care that includes shared decision making and patients goals of care with optimal outcomes
- Provides psychosocial support to and facilitates appropriate referrals for patients, families, and caregivers, especially during periods of high emotional stress and anxiety
- Empowers patients and families to self-advocate and communicate their needs
- Adheres to established regulations concerning patient information and privacy
- Promotes a patient- and family-centered care environment for ethical decision making and advocacy for patients with cancer
- Ensures that communication is culturally sensitive and appropriate for identified level of health literacy
- Facilitates communication among members of the multidisciplinary cancer care team to prevent fragmented or delayed care that could adversely affect patient outcomes.

Competency Category 3: Education

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

Novice ONN

- Assesses educational needs of patients, families, and caregivers by 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 (e.g., survivorship care plan, treatment summary)
- Educates patients, families, and caregivers on the role of the ONN
- Orients and educates patients, families, and caregivers to the cancer healthcare system, multidisciplinary team member roles, and available resources
- Promotes autonomous decision making by patients through the provision of personalized education and support
- Educates and reinforces the significance of adherence with the patients, families, and caregivers regarding treatment schedules, protocols, and follow-up
- Assesses and promotes healthy lifestyle choices and self-care strategies through education and referrals to ancillary services
- Provides anticipatory guidance and manages expectations 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
- Obtains or develops oncology-related education materials for patients, staff, and community members as appropriate
- Provides education on genomic and molecular testing and the implication of the results.

Competency Category 4: Professional Role

The ONN works to promote and advance the role of the ONN and takes responsibility to pursue personal professional growth and development. In addition, the ONN facilitates continual promotion and quality improvement of the organization's navigation program to best meet the needs of their community. The ONN,

Novice ONN

Promotes lifelong learning and evidence-based practice 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 ONN program and role development, implementation, and evaluation within the healthcare system and community

Participates in the tracking and monitoring of metrics and 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 participate in quality improvement based on identified service gaps.

In collaboration with other members of the healthcare team, builds partnerships with local agencies and groups that may assist with cancer patient care, support, or educational needs

Establishes and maintains professional role boundaries with patients, caregivers, and the multidisciplinary care team in collaboration with manager, as defined by job description.

Competency Category 5: Expert Oncology Nurse Navigator

The expert ONN is proficient in the role and has the education, knowledge, and experience to use critical thinking and decision making skills pertaining to the evolution of the ONN role and process improvement in the navigation processes. The expert ONN,

Expert ONN

Contributes to development of the cancer program community needs assessment and makes suggestions to the cancer committee on navigation program changes related to community assessment outcomes and cancer program strategic plan

Assists in gap analysis, quality improvement, and process improvement measures, data analysis, and makes recommendations to the cancer committee for appropriate navigation program changes related to the data

Develops and promotes pathways for ONN patient recruitment by collaborating with internal and external stakeholders

Tracks use of internal and external resources of staff and patients, and makes recommendations for appropriate or improved use as needed

Expands current or develops new processes to survey patient and/or caregiver satisfaction related to navigation services, collects results, and reports to cancer committee

Contributes to program growth through collaboration with cancer program administration to develop a marketing strategy to support the navigation program

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

Disseminates information about the ONN role to other healthcare team members through peer education, mentoring, and preceptor experiences

Collaborates with treating physician(s) and support staff to prevent unnecessary hospitalizations or clinic visits, and improved adherence to treatment through the design and implementation of appropriate patient education and follow-up

Orients, mentors, and guides novice ONNs

Collaborates with cancer program administration and cancer committee to develop strategies to fulfill the requirements and standards of the American College of Surgeons Commission on Cancer

Contributes to program sustainability, improvement, and/or development through collaboration with the institutional foundation in grant writing and philanthropy.



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