Patient Navigation Summative Assessment

Students are expected to:

- Define and distinguish their role and scope as a navigator
- Demonstrate empathy and appropriate communication and motivational interviewing skills (open-ended questions, affirmations, reflective listening, summarize)
- Respond to emerging challenges and goals of the client
- Identify risks factors affecting the client (i.e. safety, burnout, deterioration etc.)
- Name and discuss available resources that align with client goals
- Organize and structure interview to initiate/establish plan or action

Evaluation Rating Scale

Fail	U-Unsatisfactory	The student lacks awareness, knowledge, and/or ability associated with the expected outcomes reflecting an understanding of the patient navigator role/scope of practice (see expectations above). The student requires significant further learning and effort to achieve an acceptable level of understanding.
	NI - Needs Improvement	The student has shown some limited evidence of awareness, knowledge, and/or ability associated with the expected outcomes reflecting an understanding of the patient navigator role/scope of practice (see expectations above). Would require significant individual guidance and prompting. The student may be able to demonstrate improvement based on further learning, individual feedback, and student effort.
Pass	S – Satisfactory	The student has met minimum expectations and demonstrated the awareness, knowledge, and/or ability associated with the expected outcomes reflecting an understanding of the patient navigator role/scope of practice (see expectations above).
	G – Good	The student has demonstrated awareness, knowledge, and/or ability, and at times exceeded expectations for the expected outcomes reflecting an understanding of the patient navigator role/scope of practice (see expectations above). Shows increasing level of understanding.
	E – Excellent	The student has frequently exceeded the awareness, knowledge, and/or ability associated with the expected outcomes reflecting an understanding of the patient navigator role/scope of practice (see expectations above) and is performing at the advanced level. Shows exceptional understanding.

	N/A – Not Applicable	The student did not have the opportunity to demonstrate competency for this case study evaluating the expected outcomes reflecting an understanding of the patient navigator role/scope of practice (see expectations above) and/or the evaluator did not have the opportunity to observe this area.

Adapted from Indiana University Department of Counseling and Educational Psychology, Center for Human Growth.

Specific characteristics for summative client interview:

Criteria for interviewing skills	Poor	Fair	Good	Excellent
Posture	Closed posture Little/no eye contact Flat tone of voice Disengaged	Minimal eye contact Facial expression: minimal/too much Appears disinterested/ lacks empathy	Empathy Good eye contact Appropriate facial expression & gestures much of the time	Mastery in the areas of empathy, eye contact, facial expression/gestures Physical distance& tone of voice
Facilitation/ Affirmations	No facilitation of further discussion by the interviewee; Speech difficult to understand or hear; Did not pay attention to client cues	Minimal facilitation to further discussion; Interrupted interviewee & did not pay attention to client cues	Good facilitation some of the time, though awkward at times. Interviewee not affirmed or encouraged to make more meaningful statements. Interviewer paid some attention to client cues.	Good use of facilitation and affirmations to encourage client, who responded with more meaningful statements. Interviewer spoke clearly (not too fast/slow); Interviewer was attentive to client answers and cues.
Reflective statements	No use of reflective statements to draw out client's concerns.	Use of one or more reflective statements.	Appropriate and consistent use of reflective statements to draw out client.	Effective use of reflective statements to draw out client feelings and continue interview.
Paraphrase/ Summarizations	Never paraphrased or summarized what client was saying.	Some paraphrasing or summarizing but inconsistent and with some parroting.	Often paraphrased and summarized consistently without parroting	Meaningful and effective use of paraphrasing and summarizing to facilitate the interview.

			the client's words.	
Questions	Frequent closed questions	Used questions more than open-ended statements.	Used 2 or more probing questions during interview to facilitate interview.	Used a mix of probing questions, open-ended statements, etc. to facilitate interview.
Rapport/Trust Relationship development	No evidence of sufficient development of rapport/trust.	Some ability to establish relationship.	Adept at conveying positive regard, warmth, non-judgemental attitude, empathy, genuineness and trust.	Demonstrates authenticity, positive regard, warmth, non-judgemental attitude, empathy, respect, genuineness and trust.
Interview process	No introduction of self or role or interview process; Scattered identification of client concerns; Directive/counselling; No final wrap-up with identified plan of action and review for client input. Over the 20 minute interview limit.	Some ability to introduce interview process with client; Addresses some client concerns but may focus on counselling rather than providing the liaison role to connect client with resources. Over the 20 minute limit.	Introduces self, identifies time-frame for interview, Addresses some of client concerns; Provides a plan of action. Within the 20 minute time for the interview.	Introduces self, role and initiates interview; Establishes time-frame for interview; Ensures client's concerns have been identified; Provides summary and plan of action with client's affirmation to wrap up the interview. Time: max 20 minutes.