

## Component IV: Emerging/Enhanced Roles

### Topic 1: Patient Advocacy, Liaison, and Navigator

#### Statement of Purpose

To prepare the learner with basic knowledge and skills necessary to understand the role of a patient advocate.

#### Student Learning Outcomes

Upon completion of this topic, the learner will be able to:

1. Spell and define key terms.
2. Identify and define the many roles of a patient advocate.
3. Understand the importance of the documentation and revenue cycles and patient outcomes.
4. List the skills and competencies needed to provide services to patients and families.
5. Practice oral and written communication skills.
6. Advocate patient and family education.
7. Explain concept of customer service and empathy as it relates to patient managed care.
8. Learn how to market your patient advocacy services.

#### Terminology

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| 1. Advanced Directive                    | 19. Health Insurance Portability and Accountability Act (HIPAA)     |
| 2. Affordable Care Act                   | 20. Home care   |
| 3. Americans with Disabilities Act (ADA) | 21. Managed care  |
| 4. Appointment scheduling                | 22. National Association of Healthcare Advocacy Consultants (NAHAC) |
| 5. Brochures                             | 23. Navigator   |
| 6. Claims                                | 24. Needs assessment  |
| 7. Communication skills                  | 25. Outpatient services   |
| 8. Community resources                   | 26. Patient education   |
| 9. Conflict resolution                   | 27. Patient rights  |
| 10. Consultations                        | 28. People skills   |
| 11. Continuing education                 | 29. Power of attorney   |
| 12. Counseling                           | 30. Psychology  |
| 13. Customer service                     | 31. Risk management   |
| 14. Empathy                              | 32. Service fees  |
| 15. Ethics                               | 33. Social services   |
| 16. Family education                     | 34. Telehealth  |
| 17. Health care legislation              |   |
| 18. Health insurance                     |   |

#### References

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7. Sayles, N., (2010), *Introduction to Computer Systems for Health Information Technology*, Chicago IL: American Health Information Management Association (AHIMA).
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9. Thomas, W.J., (2010), *The Patient Advocates Handbook, 300 Questions and Answers to Help you Care for Your Loved One at the Hospital and at Home*. Los Angeles, CA: Panglossian Press.

Content Outline/Theory Objectives	Suggested Learning Activities
<p><b>Objective 1</b>  <b>Spell and define key terms.</b></p> <ul style="list-style-type: none"> <li>A. Review the terms listed in the terminology section.</li> <li>B. Spell the listed terms accurately.</li> <li>C. Pronounce the terms correctly.</li> <li>D. Use the terms in their proper context.</li> </ul>	<ul style="list-style-type: none"> <li>A. Games: word searches, crossword puzzles, Family Feud, Jeopardy, bingo, spelling bee, hangman and concentration.</li> <li>B. Administer vocabulary pre-test and post-test.</li> <li>C. Discuss learning gaps and plan for applying vocabulary.</li> </ul>
<p><b>Objective 2</b>  <b>Identify and define the many roles of a patient advocate.</b></p> <ul style="list-style-type: none"> <li>A. Medical assistance.</li> <li>B. Insurance assistance.</li> <li>C. Home health assistance.</li> <li>D. Geriatric and elder care.</li> <li>E. Legal assistance.</li> <li>F. Communication assistance.</li> <li>G. Negotiation and mediation assistance.</li> </ul>	<ul style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned Readings</li> <li>C. Have students work in groups to determine the tasks performed for each of these advocacy roles.</li> <li>D. Groups report and make a list of skills and competencies needed to perform the above tasks.</li> </ul>
<p><b>Objective 3</b>  <b>Understand the importance of the documentation and revenue cycles and patient outcomes.</b></p> <ul style="list-style-type: none"> <li>A. Documentation cycle.</li> <li>B. Medical records.</li> <li>C. Patient history.</li> <li>D. Revenue cycle.</li> <li>E. Insurance benefits.</li> <li>F. Insurance claims.</li> <li>G. Patient outcomes.</li> <li>H. Care plan.</li> </ul>	<ul style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned Readings</li> <li>C. Present scenarios for students to determine documentation needed to advocate for a patient.</li> </ul>
<p><b>Objective 4</b>  <b>List the skills and competencies needed to provide services to patients and families.</b></p> <ul style="list-style-type: none"> <li>A. Communication <ul style="list-style-type: none"> <li>1. Active and reflective listening.</li> <li>2. Speaking.</li> <li>3. Reading comprehension.</li> <li>4. Social perceptiveness.</li> <li>5. Clear and direct writing persuasion.</li> </ul> </li> <li>B. Knowledge <ul style="list-style-type: none"> <li>1. Medical documentation.</li> <li>2. Medical procedures.</li> <li>3. Medical laws and policies.</li> <li>4. Insurance practice.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned Readings</li> <li>C. Have students refer to list from objective 2 and compare their list with class discussion.</li> </ul>

<ul style="list-style-type: none"> <li>C. Customer Service               <ul style="list-style-type: none"> <li>1. Service orientation.</li> <li>2. Counseling.</li> <li>3. Psychology.</li> <li>4. Patient safety.</li> <li>5. Patient sensitivity.</li> </ul> </li> <li>D. Administrative Skills               <ul style="list-style-type: none"> <li>1. Time management.</li> <li>2. Organization.</li> <li>3. Computer literacy.</li> <li>4. Critical thinking.</li> </ul> </li> </ul>	
<p><b>Objective 5</b>  <b>Practice oral and written communication skills.</b></p> <ul style="list-style-type: none"> <li>A. Oral comprehension               <ul style="list-style-type: none"> <li>1. Listening.</li> <li>2. Speaking.</li> </ul> </li> <li>B. Oral expression               <ul style="list-style-type: none"> <li>1. Posture.</li> <li>2. Non-verbal communication.</li> <li>3. Empathetic words.</li> </ul> </li> <li>C. Written comprehension               <ul style="list-style-type: none"> <li>1. Patient needs.</li> </ul> </li> <li>D. Written expression               <ul style="list-style-type: none"> <li>1. Clear and direct content.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Role play a variety of patient/advocate, advocate/family member, advocate/health provider scenarios and have students compose criteria for each interaction.</li> <li>C. Have students prepare written materials such as letters, memos, and information brochures for above scenarios.</li> </ul>
<p><b>Objective 6</b>  <b>Advocate patient and family education.</b></p> <ul style="list-style-type: none"> <li>A. Meetings</li> <li>B. Seminars</li> <li>C. Workshops</li> <li>D. Preventive health care organizations</li> <li>E. Health care manual</li> </ul>	<ul style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned Readings</li> <li>C. Have students prepare an information brochure for patient and family members to explain the care plan for a specific chronic care disease.</li> <li>D. Have students research a preventive health care organization such as the American Diabetes Association and prepare a reference material for a patient.</li> </ul>
<p><b>Objective 7</b>  <b>Explain concept of customer service and empathy as it relates to patient managed care.</b></p> <ul style="list-style-type: none"> <li>A. Patient demographics.</li> <li>B. Patient knowledge and life experience.</li> <li>C. Family support dynamics.</li> <li>D. Identifying patient expectations.</li> <li>E. Establishing a trusting relationship with patient and family.</li> <li>F. Exercising empathy and care during interactions with patient.</li> </ul>	<ul style="list-style-type: none"> <li>A. Lecture/Discussion</li> <li>B. Assigned Readings</li> <li>C. Have students role play special scenarios requiring empathy and understanding of patient needs and profiles.</li> </ul>

G. Showing respect for patients' rights and wishes. H. Patient satisfaction.	
<b>Objective 8</b> <b>Learn how to market your patient advocacy services.</b> A. Defining and developing your brand. B. Developing strategies for publicizing your services. C. Creating a website. D. Partnering with local physicians and clinics	A. Lecture/Discussion B. Assigned Readings C. Have students develop a marketing plan for a patient advocate.