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NAVIGATING THE U.S. HEALTH CARE SYSTEM

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Health Navigator Applied Associate Degree and Academic Certificate Programs



“Health Navigator” is the term used by the Association of Schools and Programs of Public Health (ASPPH) and the League for Innovation in the Community College (League) for applied associate degrees and academic certificate programs that prepare students for employment in existing and emerging fields such as community health worker, patient navigator, and health insurance navigator. These programs also benefit employers and practitioners by offering opportunities for employees to obtain academic credentials that reflect the knowledge, skills, and abilities gained through job experience. As recommended by the Society for Public Health Education (SOPHE), Health Navigator programs should be designed to transfer to bachelor’s Health Education degree programs should a graduate wish to do so.

The need for individuals with the skills to help patients obtain and maximally benefit from community services, clinical care, and health insurance is becoming

a major issue in the increasingly complex and expensive U.S. health system. Those with Health Navigator training may assist individuals with limited health literacy as well as the elderly with accessing community services and implementing prevention. They may facilitate access to care and follow-up for sick and complicated patients with cancer, HIV, and a range of other complex and chronic health problems. In addition, Health Navigators can assist with identifying and enrolling patients in health insurance plans including those available through the Affordable Care Act exchanges, Medicaid, Medicare, as well as through community health centers.

The recommended Health Navigator applied associate degree program includes 30 semester credit hours of general education as well as 30 semester credit hours of coursework in the following areas:

- **Public Health Core:** 1) Population & Personal Health; 2) Overview of Public Health; and 3) Health Communications
- **Health Navigator Core:** 1) Prevention & Community Health; 2) Accessing and Analyzing Health Information; 3) Healthcare Delivery Systems; 4) Health Insurance
- Experiential learning
- Elective coursework allowing students to tailor their education to specific jobs in the field

This coursework can also form the centerpiece of academic certificate programs designed for nurses and allied health students as a complement to their clinical education. Certificate programs are well-suited for individuals with workforce experience and/or an academic degree who seek to augment their academic portfolio with a Health Navigator credential. Detailed course content outlines are available at www.league.org/ccph/ as part of the *Community Colleges and Public Health* report.

While this need has existed for a long time, until recently it has not been met through paid positions with well-defined roles. This is rapidly changing as a result of the growing commitment to develop specific Health Navigator positions and to integrate these positions into the healthcare and public health systems. Moreover, new funding mechanisms as part of Medicaid, Medicare’s 30-day hospital readmission policy, and the Affordable Care Act have dramatically increased demand for employees with Health Navigator credentials. Salaries for Health Navigator graduates range from \$30,000 to \$55,000 per year. The Department of Labor estimates that by 2022 the demand for Community Health Workers—the only Health Navigator-related job classification it currently tracks—will increase by at least 25 percent.

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INTRODUCING

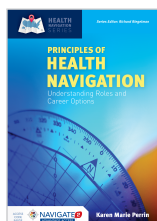
THE HEALTH NAVIGATION SERIES

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The NEW Jones & Bartlett Learning *Health Navigation* series meets the full range of Health Navigation education competencies of the League for Innovation in the Community College based on the Association of Schools and Programs of Public Health (ASPPH) Community Colleges and Public Health report.

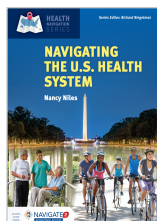
Developed under the editorial direction of Richard K. Riegelman, MD, MPH, PhD, this series of three textbooks and accompanying digital learning materials is designed for Health Navigator associate degree and certificate programs leading to employment as community health workers, patient navigators, and/or health insurance navigators.



Principles of Health Navigation

by **Karen Marie Perrin**, PhD, MPH, CPH University of South Florida,
College of Public Health

This text will provide an overview of the content and knowledge competencies expected as part of health navigation education including health services delivery and health insurance, care of the individual, and accessing and analyzing health information competencies.



Navigating the U.S. Health System

by **Nancy Niles**, PhD, MPH, MS, MBA, Lander University

This text will comprehensively cover the knowledge competency in healthcare delivery and public health expected as part of health navigation education in the United States.



Navigating Health Insurance

by **Alexis Pozen**, PhD, and **James Stimpson**, PhD, MA,
Both of the CUNY School of Public Health

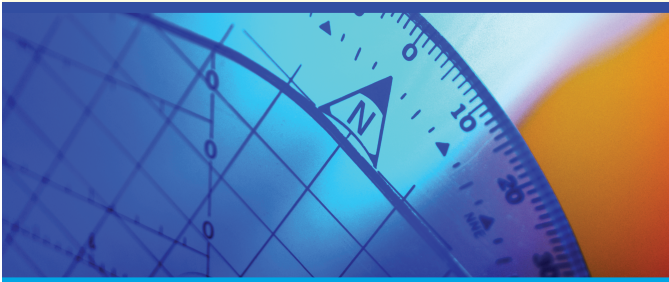
This text will comprehensively cover the health insurance knowledge competencies needed to understand health insurance and serve as a health insurance navigator.

Each title will serve as a free-standing text designed for a 3 semester hour course. Together the series will cover the required course work recommended for health navigation associate degree and academic certificate programs by the ASPPH Community Colleges and Public Health report.



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ABOUT THE AUTHOR

Nancy J. Niles, PhD, MPH, MS, MBA, is in her 12th year of full-time undergraduate teaching. She is in her second year of teaching undergraduate and graduate healthcare management and administration courses at Rollins College in Winter Park, Florida. Prior to Rollins College, she taught 8 years of undergraduate business and healthcare management classes in the AACSB-accredited School of Management at Lander University in Greenwood, South Carolina, having spent 4 years teaching in the Department of Business Administration at Concord University in Athens, West Virginia. She became very interested in health issues as a result of spending two tours with the U.S. Peace Corps in Senegal, West Africa. She focused on community

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PREFACE

The focus of this textbook is on how to navigate the complex U.S. healthcare system from a patient perspective. I have provided an overview of the different components of the healthcare system but in each chapter I have a section that outlines how to navigate that specific component of the healthcare system.

The following is a summary of each chapter.

CHAPTER 1

It is important as a healthcare consumer to understand the history of the U.S. healthcare delivery system, how it operates today, who participates in the system, what legal and ethical issues arise as a result of the system, and what problems continue to plague the healthcare system. We are all consumers of health care. Yet, in many instances, we are ignorant of what we are actually purchasing. If we were going to spend \$1,000 on an appliance or a flat-screen television, many of us would research the product to determine if what we are purchasing is the best product for us. This same concept should be applied to purchasing healthcare services.

Increasing healthcare consumer awareness will protect you in both the personal and professional aspects of your life. You may decide to pursue a career in health care either as a provider or as an administrator. You may also decide to manage a business where you will have the responsibility of providing health care to your employees. And last, from a personal standpoint, you should have the knowledge from a consumer point of view so you can make informed decisions about what matters most—your health. The federal government agrees with this philosophy. The Affordable Care Act's health insurance marketplaces provide

cost and service data so consumers can determine what is the best healthcare insurance to purchase and what services they will be receiving for that purchase. Recently, the Centers for Medicare and Medicaid Services (CMS) used its claim data to publish the hospital costs of the 100 most common treatments nationwide. The purpose of this effort is to provide data to consumers regarding healthcare costs because the costs vary considerably across the United States. This effort may also encourage pricing competition of healthcare services. The U.S. Department of Health and Human Services is providing funding to states to increase their healthcare pricing transparency. This may change with the new administration's refocus on how to provide health care to individuals in this country.

Each of these areas can have representation for a health navigator. This textbook will cover the health navigator role in all of these areas except insurance. Because the insurance arena is so complicated, an individual textbook will be devoted to this component of the healthcare system.

Health navigators can assist patients with inpatient and outpatient care. Developing a system-wide network of navigators trained to be patient advocate specialists in designated areas can only enhance the philosophy of a patient-centric healthcare system. Healthcare navigators have been shown to be effective at improving chronic disease management, smoking cessation, and adult immunizations.

CHAPTER 2

The U.S. healthcare system is a complicated system that is comprised of both public and private resources. Health care is available to

those who have health insurance or who are entitled to health care through a public program. One can think of the healthcare system as several concentric circles that surround the most important stakeholders in the center circle: the healthcare consumers and providers. Immediately surrounding this relationship are health insurance companies and government programs, healthcare facilities, pharmaceutical companies, and laboratories, all of which provide services to consumers to ensure they receive quality health care, as well as support providers to ensure they provide quality health care. The next circle consists of peripheral stakeholders that do not have an immediate impact on the main relationship but are still important to the industry. These consist of the professional associations, the research organizations, and the medical and training facilities. The health navigator has many opportunities to assist a patient with many of the stakeholders that interact with the patient to achieve a desired health outcome. It is the responsibility of the health navigator to receive training in the appropriate areas to successfully assist the patient with their rights and responsibilities.

CHAPTER 3

When many of us think of dealing with government agencies, we think of the typical adage of how government rules and regulations often complicate communication with consumers. Because there are so many government agencies that are responsible for different components of the healthcare system, it can be difficult for healthcare consumer to manage all of these interactions. For example, some elderly patients may be qualified for both Medicare and Medicaid which requires twice the communication needed when receiving care. A health navigator can be very helpful in these types of situations. A health navigator can be a mediator between government agencies and the healthcare consumer. In order to be successful in this role, the navigator should understand government rules and regulations and which agencies are responsible for oversight of these types of rules.

CHAPTER 4

The role of the public health or community navigator can have both a broad and narrow perspective. Public health focuses on providing community health programs that can improve the health of many individuals in a community. A public health navigator can take a leading role in assisting with these types of population based programs. Secondly, the public health navigator can also provide specific health programs to certain targeted demographics that need assistance with improving at risk health behavior. For example, a “womb to tomb” public health navigator model in La Plata county Colorado focused on both children and seniors regarding their health status. This navigator program developed an integrated healthcare and social support services to target those community members that needed assistance with self-care management and disease prevention (Nurse Navigator program, 2016). A nurse can also become a public health navigator as part of his or her role in a public health department. A social worker can also become a health navigator when s/he collaborates with the public health department. From a broader perspective, a state health department could appoint a clinician to oversee public health navigator activities to ensure that more of the population will be reached. It is important to remember that the mission of public health is to increase access to health services as well as to teach individuals health education to ensure they will remain disease free. The public health navigator should be trained in public health as well as have working knowledge of health education. The health navigator could also be used during a public health crisis when communication is needed between victims and health and emergency workers so crisis management training would also be an asset for health navigators. This type of health navigator can be a contributor to improving the community’s health.

CHAPTER 5

The role of the health navigator can play a huge role in providing assistance when an individual becomes a patient in a healthcare facility. The focus of the health navigator is to help the patient become

empowered. With the ongoing problem of patient deaths resulting from medical errors, it is important that the patient safety is maximized and a health navigator can assist with this goal. Health consumer literacy can play a role in patient safety. Ongoing communication between the providers, patient, and facility also contributes to patient safety. Providing assistance with informed consent for patient care and helping the patient understand the type of care provided is crucial. Assisting with any legal issues such as living wills and advance directives may be needed. A health inpatient service navigator may have to deal with both private and government healthcare insurance when dealing with inpatient services. Overall, having a patient advocate such as a health navigator can be a valuable safeguard for the patient. Health inpatient services navigators should be trained in healthcare insurance which includes both private and public coverage such as Medicare and Medicaid. There should be also training in advance directives and living wills. Having a clinical background can be very helpful so the navigator can provide insight into why certain tests and care are being performed.

CHAPTER 6

The health navigator plays an important role in outpatient service for patients. Because there are so many outpatient services available, it is important for the navigator to ensure that the patient is receiving the appropriate care and testing and that the patient understands why they are having outpatient care. It can be more difficult to deal with outpatients services if the patient must coordinate their care with several agencies. That requires organization of the coordinated care and collaboration with the different providers. Secondly, there are several community organizations that can assist with chronic diseases such as dementia or have a terminal disease. The navigator can work with both the patient and their families to ensure they have contacted the appropriate organizations.

CHAPTER 7

The Health Navigation professions include a large number of job titles. There are three general areas of employment which are often identified as

Community Health Workers, Patient Navigators, and Health Insurance Navigators. Employment for a wide range of health navigation professions has grown rapidly in recent years. New funding mechanisms from Medicaid, Medicare, and the Affordable Care Act have dramatically increased interest in developing these types of career positions which need academic Health Navigator training. Community Health Workers are the only Health Navigation employment classification tracked by the U.S. Department of Labor. Community Health workers and health educators are classified together. The Labor Department's Occupational Outlook estimates that the positions for community health workers and health educators will increase 15% by 2024. According to the Department of Labor, insurance companies, employers, and governments are trying to find ways to improve the quality of care and health outcomes, while reducing costs. They hire health educators and community health workers to teach people about how to live healthy lives, obtain screenings, and how to avoid costly diseases and medical procedures. They explain how lifestyle changes can reduce the probability of contracting illnesses such as lung cancer, HIV, heart disease, and skin cancer. Health educators and community health workers also help people understand how to manage their condition and avoid unnecessary trips to the emergency room. Health educators and community health workers help people understand how their actions affect their health. The median annual wage for community health workers was \$36,300 in May 2015. A registered nurse who becomes a health navigator may have a salary of \$65,000. A social worker who becomes a health navigator may have a salary of \$44,000. Health educator positions require more education and therefore their median wage in 2015 was significantly higher at \$51,000.

Although the concept of a healthcare navigator has been utilized in different areas of health care, the concept of the navigator was fully introduced to a national audience as part of the Affordable Care Act. The first patient navigation program began in 1990 by Harold Freeman. In 2005, President Bush signed the Patient

Navigator and Chronic Disease Prevention Act which established a research program to examine cost effectiveness of navigation programs. In 2006, the Center for Medicare and Medicaid Services funded six multiyear demonstration programs on navigation programs. In 2000, the Health Resources and Services Administration (HRSA) funded six programs that focused on chronic disease navigation programs and in 2010, added 10 new sites (Huber, Shapiro II, Burke, & Palmer, 2014). Then the ACA established insurance navigators at the state government level to help with the insurance marketplace websites. According to the healthcare.gov website, a navigator is an individual or organization that's trained and able to help consumers, small businesses, and their employees as they look for health coverage options through the Marketplace, including completing eligibility and enrollment forms. These individuals and organizations are required to be unbiased. Their services are free to consumers. The ACA created the Navigator program or In-Person Assister (IPA) as part of their outreach and enrollment assistance to those individuals who were purchasing insurance coverage from the Health marketplace. Any marketplace was required to have a navigator program to assist healthcare consumers. Navigators were required to provide education and to assist with enrollment in insurance programs and contracted directly with the Center for Medicare and Medicaid Services. They were required to complete 30 hours of training. Assuming these navigator positions would be eliminated if the new administration eliminates the marketplaces, hopefully this concept of a navigator would continue to increase information literacy regarding insurance.

Prior to the implementation of the healthcare marketplaces, navigators were used to assist in many areas including mental health, cancer, primary care, uninsured population, clinical ethics consultations, case management, and long-term care. Like the navigators for the healthcare marketplace, their main goal is to assist the healthcare consumer with making educated decisions regarding their health care and the health care of their loved ones. Another term for a healthcare

navigator is a patient advocate. As our healthcare system becomes more patient centric and performance based, there will be more navigator roles developed to ensure that patients' comprehension of their healthcare system is clear. The ultimate goal is to ensure that the healthcare system works for the patient so they can achieve the best health outcome.

CHAPTER 8

Being a health navigator for information technology can be very invaluable to a patient. With the increased use of electronic health records, patient portals and telemedicine, many older patients may feel confused. Although the number of elderly individuals who use technology have increased, that population still feels more uncomfortable with information technology. Being an IT Health Navigator could be extremely beneficial to patients. Many patients do not keep copies of their medical records. They are often confused about their medications. Having access to electronic copies of their records and records of their medications could be very beneficial to patients. To be an IT Health Navigator, the navigator would need to be very familiar with electronic health record use as well as be comfortable with technology in general. Microsoft has developed an electronic patient record system that allows individuals to personally keep their medical records electronically. An IT Health Navigator could be very instrumental with this type of electronic record keeping and increase the patient's health technology literacy.

CHAPTER 9

The health navigator can play an instrumental role in helping the patient understand their legal rights as a patient. The patient may or may not understand that the relationship with the provider is a legal relationship and the patient has rights that must be respected. The concept of the Patient Bill of Rights that outlines the patient rights of autonomy in their health care may or may not be adhered to by a provider. The patient navigator can help the patient be empowered in recognizing their right to refuse treatment, their

right to question their provider and to be clearly informed about their patient care. The health navigator should have familiarity with healthcare law to ensure that the patient is treated within his or her legal rights. For example, a provider cannot abandon a patient. There are regulations in place to ensure that cannot occur. The patient may not be aware of that rule. There are 44,000–99,000 medical deaths each year due to medical errors which could have been prevented by improved communication to reduce errors. A health navigator could play a role to ensure that protocols are followed to protect the patient.

CHAPTER 10

The health navigator can play an important patient advocate role when dealing with ethical dilemmas. This is pertinent particularly to the relationship between the patient and clinician. The issue with autonomy and beneficence between the two stakeholders can be difficult. The patient has the absolute right to make a healthcare decision even if the clinician does not agree it may be the best decision for the patient. Autonomy focuses on respect for the patient and beneficence focuses on doing the best for the patient's health. The two may conflict if the patient feels differently. The health navigator can be a mediator between the physician and the patient to resolve any issues. Encouraging the patient to develop advance directives so caregivers and their physicians understand and respect their wishes can be very important.

CHAPTER 11

A health navigator can play an integral role in mental health care. Many individuals go undiagnosed because of the patient's fear of being diagnosed with a mental health disorder. They are afraid to tell their family or friends about this type of medical issue. A physician who does not specialize in mental illness may misdiagnose a condition. Health navigators with experience in mental health care can be a valuable liaison with mental healthcare facilities. Navigators may assist with communication with families or the patient's clinicians. They can provide education regarding

mental illness. Because mental health care may involve both personal and professional resources, a health navigator could be a coordinator for the individual's care.

CHAPTER 12

The role of the healthcare navigator in long-term care will vary depending on the individual's preference in the type of long-term care services they need, what financial options are available to them, and the state services provided. The long-term care navigator should develop a strategic plan for the individual's long-term care services. The navigator should receive training or have a background in both public and private insurance products. Having experience in long-term care as well as a foundation in basic financial planning would also be an asset. The long-term care navigator should obtain data in the following areas:

1. State options for long-term care
2. Federal options for this individual
3. Insurance options for this individual
4. Personal financial net worth
5. Personal insurance policies

The navigator should collaborate with a personal financial planner to ensure the decision is in the best financial interest of the individual.

CHAPTER 13

The U.S. healthcare system continues to evolve. Technology will continue to have a huge impact on health care. Consumers have more information to make healthcare decisions because of information technology. All of these initiatives are exciting for the healthcare consumer. The implementation of an EHR, which will enable providers to share information about a patient's health history, will provide the consumer with the opportunity to obtain more cost-effective and efficient health care. There are hospitals, physician practices, and other healthcare organizations that utilize EHR systems across the country. Even though implementing the system nationally will be extremely expensive—costs have been estimated in the billions—it will eventually be a cost-saving measure for the United States. The

Affordable Care Act has provided many incentives to improve the quality of and access to the U.S. healthcare system. The Centers for Medicaid and Medicare Innovation has more than 40 demonstration projects that focus on different types of financing models based on the performance of healthcare providers.

All of these changes can improve health outcomes. However, the U.S. healthcare system continues to be complex. The role of patient navigators can vary across the healthcare system. The patient navigator's role can take many forms. Depending on training, a navigator can focus on different parts of the healthcare system or just one component. A navigator can focus on inpatient care; marketplace exchanges; outpatient care including chronic disease management for HIV, cancer, and other chronic diseases; telehealth; mental health; and legal and ethical consultations. Although navigators have been used for decades in cancer care, HIV, and diabetes, the role has been revisited with the implementation of the Affordable Care Act marketplace exchanges and designation of navigators for those exchanges. The Centers for Disease Control and Prevention indicate patient navigation is an effective intervention for HIV care. The National Cancer Institute has funded research to assess the effectiveness of these programs. The Department of

Labor, as of this writing, recognizes the community health worker as a navigator for health care. As these navigators prove their success, there are other opportunities for patient navigators to provide advocacy in many areas that are discussed in this chapter. Canada, which provides health care to all of its citizens, has a highly regulated cancer patient navigator system. The system was developed at the request of patients because of the complexity of the system. For example, a cancer patient in Canada may interact with an average of 32 physicians. Having a navigator can assist the patient with this massive communication process. Although the development of navigation programs vary from state to state and may be private or government funded, Canada has a regulated program for cancer. Cancer navigators must have five years of cancer patient experience. The navigator program is expanding its scope to include cultural sensitive navigators for diverse communities. This type of program may be an example that the United States could model particularly as it applies to regulations and standard training. The expansion of the concept of patient navigator will continue to grow as more healthcare facilities hire navigators as a way to improve patient health outcomes. Like Canada, at some juncture, there may need to be regulations to ensure quality training for the patient navigator.