Peer health navigator roles and responsibilities

In this chapter, we identify core peer health navigator roles and responsibilities, as well as the responsibilities of the agency in developing a clear peer navigator scope of practice that is based on the needs of the clients.

Peer health navigators have roles in:

- Intake and assessment
- Advocacy
- Practical assistance
- Healthcare appointment support
- Emotional and social support
- Education
- Referrals
- Support to navigate the healthcare system independently
- Collaboration
- Evaluation

Peer health navigators also have responsibilities in:

- Program planning
- Relationship development with service providers
- Up-to-date knowledge maintenance
- Documentation
- Meeting attendance
- Policy compliance
- Client-centred service delivery
- Self-care maintenance

Combined, peer health navigator roles and responsibilities constitute a navigator's scope of practice.

The development of the peer health navigator role

The literature and working group identified two agency responsibilities related to navigator roles and responsibilities. The recommendations for the responsibilities are described below, along with a review of the evidence for each. The agency responsibilities are:

- Conduct a local needs assessment
- Define a clear scope of practice

RECOMMENDATION 1: Conduct a local needs assessment that includes input from people with HIV, clients and service providers to determine the breadth of client needs. A needs assessment will help agencies to tailor peer health navigation programs and determine which roles a peer health navigator can take on to meet the needs of clients. (Type of evidence: practice)

Evidence

This recommendation emerged from the practice expertise of the working group.

RECOMMENDATION 2: Define a clear peer health navigator scope of practice and draft job descriptions that reflect the roles and responsibilities within the scope of practice. Job descriptions should also clearly outline the goals of the program and qualifications and experience that are necessary and preferred. Determine and communicate the roles and responsibilities that are outside the scope of practice of peer health navigators. Ensure job descriptions are clear and straight-forward. (Type of evidence: research and practice)

Evidence

Scope of practice refers to the roles and responsibilities of peer health navigators in a specific program. For peer health navigators, the scope of practice can vary from narrow to broad. It is the agency's responsibility to develop a scope of practice before hiring peer navigators.[65,66] Developing a scope of practice should help agencies understand how navigators will be integrated into the agency[66] and define roles for peer health navigators that complement the work of other staff such as social workers and/or outreach workers.[65,67] Clarity in scope of practice can help agencies determine hiring criteria, which facilitates the recruitment and selection process.[28]

A peer health navigator's scope of practice should be outlined in a clear job description.[15,23,27,34,49,51,62,66,68–73] A clear job description helps peer health navigators[70] and other staff understand the parameters of navigator work, shapes their training,[62] and recognizes them as members of the team.[68]

Job descriptions should be detailed,[69] include the name of the program supervisor,[63] communicate clear performance expectations,[15,51,66,71,72] and define the peer health navigator's roles and responsibilities.[34,49,68,72,73]

Although a clear job description is crucial, the roles of a peer health navigator may evolve over time,[65] based on the interest and skills of the peer health navigator or the needs and challenges of clients or the program. Peer health navigators should be encouraged to discuss changes to their roles based on emerging issues.[28,34,51,66] Doing so can bring attention to issues faced by people with HIV that program supervisors may not have considered, in addition to different ways those issues can be addressed.[51,66] As with other staff, peer navigator job descriptions should be reviewed regularly and any changes to the roles and responsibilities of a peer health navigator should be reflected in an updated job description.

> **VIGNETTE**   *Following their training, the peer health navigators felt quite confident that they understood their scope of practice. However, a few weeks after the training, the program supervisor, Kai, notices that one peer health navigator named Zoë is crossing boundaries with clients and doing work outside her scope. This includes babysitting one of her client's children. Kai likes that Zoe is using her great helping skills with her clients, but is worried that this is leading to inappropriate and unsustainable relationships with her clients. Over time, Kai works with Zoë to support her capacity to maintain required boundaries. Kai also starts to review the scope of practice regularly with all the navigators at team meetings to help them recognize when they are crossing boundaries. Within these meetings, the team also role plays talking to clients about the need to maintain appropriate boundaries. This helps them understand and work within their scope of practice and maintain good boundaries with clients.*

Core peer health navigator roles

Peer health navigator roles are the specific functions a peer navigator performs as a service provider. The literature and working group identified nine core peer health navigator roles. The recommendations for the roles are described below, along with a review of the evidence for each. The core navigator roles are:

- Intake and assessment
- Advocacy
- Practical assistance
- Healthcare appointment support
- Emotional and social support
- Education
- Referrals

- Support to navigate the healthcare system independently
- Collaboration
- Evaluation

Intake and assessment

RECOMMENDATION 3: Involve peer health navigators in the intake and assessment of clients' needs as part of an interdisciplinary team. Using their lived experience to build trust over time, the navigator's role is to help clients identify and assess their strengths and challenges and help them develop a plan to achieve their health and wellness goals. This assessment should take into account all aspects of clients' lives. (Type of evidence: research and practice)

Evidence

Peer health navigators play a role in client intake and assessment.[74–85] This starts with a preliminary meeting to build rapport with clients,[79] to identify the potential barriers to their successful engagement in care,[74–78,80,81,83,85,86] and/or to set health and wellness goals.[81,83] Some peer health navigation programs use a tool or a standardized assessment form to identify and prioritize potential client barriers to care.[79,84] Having peer health navigators participate in intake and assessments builds client trust and confidence in the healthcare system and creates a rapport with clients.[79,87]

Advocacy

RECOMMENDATION 4: Peer health navigators use advocacy skills to ensure the client's voice is heard during healthcare appointments and in the community. Navigators also have a role in raising systemic issues that impact client care. (Type of evidence: research and practice)

Evidence

There are a host of challenges clients may face when accessing care. Some barriers are related to the social determinants of health such as inadequate housing,[75,78,80,88–90] food insecurity[75,80,86,88,91] and lack of financial stability.[78–80,82–84,86,88,89,92–102] and how complex the healthcare system can be for clients.[111,112] Many barriers are logistical and include lack of transportation services,[78,84,86,88,89,93–96,98,104,105,108,109,113,114] child/elder care,[82,95] or a need for translation and interpretation services.[75,82,86,93,96,98,103–105,109,115,116]

Peer health navigators can advocate to reduce the impact these barriers have on their clients. Advocacy occurs both at the system level and for individual clients as they navigate care.

Peer navigators are in a unique position to advocate for community-level change to reduce the structural underpinnings of health disparities; peers can advocate at a government level, as well as within their health and social service agencies.[64] As service users, they understand how clients experience the system. As service providers, they have an understanding of how healthcare is delivered. This provides them with a unique opportunity to use their personal experience to identify the need for change and advocate for changes that would improve services and benefit clients.[64,78,115,117–125] Organizations that support leadership training; provide a flexible work environment; provide opportunities for peers to engage with community leaders; and hire peers who bring self-perception that they are leaders in their community, and knowledge of who to talk to in the community to make change may increase the likelihood that peer navigators engage in advocacy at the system level.[64] Peer navigators advocate for individual clients as they move through the healthcare system. They do so by advocating for clients to receive needed services,[123] care that is sensitive to the needs of specific communities, such as diverse Indigenous communities and ethnoracial communities,[115] and for benefits to be re-instated, for example.[101]

Practical assistance

> **RECOMMENDATION 5:** Peer health navigators provide practical assistance to clients such as help with transportation, housing, financial assistance, child/elder care, and other services that can facilitate optimal engagement in healthcare and achievement of health and wellness goals. (Type of evidence: research and practice)

Evidence
Using practical assistance skills, peer health navigators can help to reduce the barriers that impact their clients' ability to access and stay in care. Practical assistance can include help with scheduling and reminding clients of upcoming appointments,[3,74,82,86,88,89,93,95,96,98,99,103–110,126] **finding transportation**[78,84,86,88,89,93–96,98,104,105,108,109,113,114] **securing child and elder care,**[82,95] **arranging translation and interpretation services, and acting as interpreters.**[75,82,86,93,96,98,103–105,109,115,116]

Peer health navigators also help clients overcome barriers to care that are related to housing,[75,78,80,88–90] food insecurity,[75,80,86,88,91] and financial assistance.[78–80,82–84,86,88,89,92–102] Financial assistance support includes creating awareness of assistance programs,[78] reviewing clients' current benefits,[79] establishing client eligibility for support programs,[86] linking clients to sources of financial assistance,[88,107] and assisting clients with financial assistance applications.[78,80,82–84,86,88,89,92–102,114]

Healthcare appointment support

> **RECOMMENDATION 6:** Peer health navigators provide support to clients before and after appointments with healthcare providers, help clients to understand the purpose of a particular medical appointment or specialist, help prepare clients with questions, and provide an explanation of the visit in plain language. Peer navigators can also provide accompaniment to appointments and advocacy during appointments. (Type of evidence: research and practice)

Evidence

The healthcare system is complex and organized in a way that may not make sense to clients.[83] Peer health navigators offer pre- and post-appointment support to clients and accompany them to healthcare appointments.[3,74,75,80,82,83,86,88–90,93,95,99–101,103,107–110,114,116,118,127–129]

Peer health navigators provide three kinds of healthcare appointment support:

1. Before appointments
2. Accompaniment to appointments
3. After appointments

Support before appointments

Peer health navigators help clients prepare for medical appointments.[3,74,86,89,93,101,107,108,114,118,127,129] Supports include encouraging clients to communicate with their doctors,[74,127] helping identify and also suggesting some questions clients may want to ask during the appointment,[74,89,107] and encouraging clients to ask questions if they are unclear about any answers they receive.[74]

Navigators also help clients think through and rehearse answers to questions their doctors are likely to ask.[3,108,127] Rehearsing responses is an effective way to model communication skills[3] and coach clients to be assertive[114,127] and open[129] with their doctors.

Other pre-appointment supports peer health navigators can provide to clients and their families include explanations of how the healthcare centre works[89,93,101,118] and how to understand diagnostic test results.[89] Peer health navigators can also wait with clients before appointments.[86,108]

Accompaniment to appointments

Peer health navigators can accompany clients to appointments,[3,74,75,80,82,83,88,90,93,99,100,103,107,109,110,116,127,128] if requested. During appointments, navigators can assist in asking appropriate questions of the healthcare provider,[74,75,107,110,127] taking notes,[88] and/or providing emotional support.[107]

Support after appointments

Peer health navigators also provide support to clients after appointments.[74,80,83,93,95,116,126] When the appointment is over, peer health navigators can re-explain what test results mean,[93] what treatment recommendations are,[80] go over the doctor's instructions,[116] and

support decision-making and adherence to treatment.[95] Navigators also identify and clarify potential areas of confusion that may arise as a result of the appointment with the doctor.[74] Navigators can also support clients by picking up their prescriptions.[83,126]

Emotional and social support

> **RECOMMENDATION 7:** Peer health navigators play a role in providing emotional, cultural and social support to clients and their families (as appropriate) based on a common understanding of the experience of living with HIV. (Type of evidence: research and practice)

Evidence

Some clients need emotional and social support[88,130] and peer health navigators have a role in offering it.[3,74,75,78–83,86,88–90,93–97,99–102,105–108,110,113,114,118–123,126–129,131–144] To provide support, navigators need to build trust and rapport with clients.[83,90,97,127,133,134,137,140] Navigators can also provide emotional support to help reduce fear and mistrust of the healthcare system.[118] Help to reduce client isolation[126,128,139] can include facilitating support groups[74,75,122] and social activities.[121,136] Emotional support is offered face-to-face,[74,107] over the phone[74,107] and via email.[74]

Peer health navigators offer different types of emotional support, including setting goals and planning for the future;[81,101,135] sharing their own lived experience with illness, treatment and recovery;[110,120–122,125,131,136,138–144] providing peer counselling and social support;[75,101,119,145] addressing psychosocial issues;[108,113] and celebrating successes.[3]

Navigators are also involved in providing support to help clients to disclose diagnoses and prognoses with families.[80,101] Navigators can also offer direct emotional support to families.[88,96,99]

> **VIGNETTE** *Savita, a peer health navigator, hosts monthly group support sessions for South Asian clients. Each month, time is set aside for those clients who would like to share and celebrate certain festivals and rituals associated with their culture and faith. This is one way that Savita and the peer health navigation program recognize the significance of spirituality in the diverse South Asian communities they are a part of and serve. The agency also ensures that the group and one-on-one spaces are inclusive, respectful and accepting of the multiple ways in which South Asian people choose to express their culture.*

Education

> **RECOMMENDATION 8:** Peer health navigators provide culturally safe and trauma-informed education, information, care and support to clients and their families (as appropriate), based on a holistic model that includes the physical, emotional, spiritual and mental needs of clients and their families. Navigators share accurate information using language familiar to clients and their families, where appropriate. Health promotion information may include living well with HIV, safer sex and treatment adherence. Peer navigators are supported by supervisors to know their limitations and competencies and will seek out other referrals when necessary. (Type of evidence: research and practice)

Evidence

Clients may need information about their illness and its treatment,[146] and peer health navigators play an important role educating them.[74,75,80,86,88–90,92,93,95–97,99,105,107,109,110,117,123–127,129,132–134] While doing this work, peer health navigators take into account the cultural needs of clients[75,134] and use plain language.[89,92]

Peer health navigators can share information with clients through trusted websites and printed materials that explain diagnosis, treatment, treatment adherence and treatment side effects.[74,86,95–97,105,107,110,126] Health navigators may provide health promotion and disease prevention education that addresses behaviour change, safer sex, harm reduction and confidentiality.

Peer health navigators also share information about available community and financial resources[131,132] with clients and their families.[93,127,133]

Referrals

> **RECOMMENDATION 9:** Peer health navigators provide referrals to appropriate services when needed to facilitate optimal engagement in healthcare and achievement of the person's personal health and wellness goals. When referrals to other professional services are needed, navigators should be aware of services and programs that are culturally safe and appropriate. (Type of evidence: practice)

Evidence
This recommendation emerged from the practice expertise of the working group.

VIGNETTE *Kim, a Black peer health navigator, is staffing drop-in hours at the HIV clinic. Dave, an Indigenous client who is new to the city, tells her he wants support from an Indigenous organization. Kim remembers that her supervisor created a resource kit of local community agencies, groups and services that is kept up-to-date. Because navigators and other professionals are encouraged to update the resource kit as new services are developed, and because the program supervisor makes regular contact with local Indigenous health programs, support programs for newcomers, and other culturally specific services, Kim can find out easily where she can refer Dave for support. When making the referral, Kim provides Dave with a few options, including a local talking circle and drumming group at the Aboriginal Friendship Centre. Kim asks Dave if he wants her to accompany him to the Friendship Centre, and he accepts.*

Support to navigate the healthcare system independently

RECOMMENDATION 10: Peer health navigators help clients develop the skills necessary to self-manage their own care and make informed decisions about their health. (Type of evidence: research and practice)

Evidence

One of the roles of a peer health navigator is to help clients learn how to navigate the healthcare system and manage their care.[75,78,82,85,92–94,107,114,117,120,121,123,124,139,140,144,147]

Keeping their actions continually focused and centred on the self-determined health and wellness goals of clients, health navigators can help clients learn when and how to seek care,[75] including the specific steps to take to navigate the health system;[92] support to make informed decisions about their health and treatment that reflect their cultural values;[93,114,120] and/or support to keep their appointments[107,121] and adhere to treatment.[107] Self-management support also includes building client confidence to navigate the system independently.[82]

Collaboration

RECOMMENDATION 11: Peer health navigators work in partnership with clients and the healthcare team. Peer health navigators bring gaps in client care and support to the attention of the care team. Effective and collaborative relationships with clients and the healthcare team facilitate this role. (Type of evidence: practice)

Evidence

This recommendation emerged from the practice expertise of the working group.

> **VIGNETTE**   *Wendy, a navigation client, is struggling with social isolation in her current apartment and her daily schedule is becoming more and more chaotic. The team's social worker, Quinn, starts to recognize this and speaks to Wendy about different options for stable supportive housing. They agree to speak again in a week and to invite Darla, her peer health navigator, to attend this meeting. Darla and Wendy have a very trusting relationship and within this meeting Darla is able to provide unique insight into Wendy's need for socialization. Because Wendy knows that Darla understands her, Darla's presence makes it easier for Wendy to attend the meeting and communicate her preference for a more stable and social living environment.*

Evaluation

RECOMMENDATION 12: Peer health navigators play a role in developing, administering and analyzing the monitoring and evaluation of the peer health navigation program. (Type of evidence: practice)

Evidence

This recommendation emerged from the practice expertise of the working group.

Core peer health navigator responsibilities

Peer health navigator responsibilities are the tasks peer health navigators perform as members of a broader team. The literature and working group identified eight core peer health navigator responsibilities. The recommendations for the responsibilities are described below, along with a review of the evidence for each. The core navigator responsibilities are:

- Program planning
- Relationship development with service providers
- Knowledge maintenance
- Documentation
- Meeting attendance
- Policy compliance
- Client-centred service delivery
- Self-care maintenance

Program planning

RECOMMENDATION 13: Peer health navigators plan, coordinate, organize and make meaningful and concrete contributions to activities related to the navigation program, according to the principles of GIPA/MEPA. (Type of evidence: research and practice)

Evidence

Peer health navigators play a part in the development and implementation of navigation programs. Their personal experience as service users and their professional experience as service providers are invaluable to program planning.

Peer health navigators have a responsibility to support the planning, coordination and organization of navigation programs,[105] and to contribute to the development of new policies, procedures and services.[124]

Relationship development with service providers

RECOMMENDATION 14: Navigators maintain and sustain effective and collaborative professional relationships with clients and healthcare teams with the support and facilitation of program supervisors. (Type of evidence: research and practice)

Evidence

Peer health navigators foster strong relationships with colleagues and other service providers. They maintain good relationships with other services providers[86,97] including other navigators,[97] clinical staff [86] and support service staff.[86]

RECOMMENDATION 14a: Develop a process that supports relationship development between peer health navigators and external partners. (Type of evidence: practice)

Evidence

This recommendation emerged from the practice expertise of the working group.

Knowledge maintenance

RECOMMENDATION 15: Peer health navigators maintain up-to-date knowledge of available community and clinical services, with the support of program supervisors. Navigators share new knowledge with program supervisors and other members of the healthcare team. (Type of evidence: practice)

This recommendation emerged from the practice expertise of the working group.

Documentation

> **RECOMMENDATION 16:** Peer health navigators maintain confidential and secure documentation of work with and for clients according to program policies. Documentation standards are determined by program supervisors in conjunction with peer health navigators. (Type of evidence: research and practice)

Evidence

Peer health navigators document their interactions with, and actions on behalf of, clients.[76,86,89,90,97,118] In addition to recording client encounters,[76,86,89,97] navigators also document client barriers to care.[89,118]

Peer health navigators use standard templates to record their work with, or on behalf of, clients.[79,84,86,89] Some of these tools are used at intake so that navigators can identify and prioritize client needs.[79,84] These tools may be used at other times as well.

> **VIGNETTE**   *Based on discussions between the host agency and their clinical partner, there is an agreement that navigators have limited access to charting privileges at the HIV clinic. The agreement is that peer health navigators can enter case notes but do not have access to the patient's complete medical record. Protocols are developed for the peer health navigators to ensure security and confidentiality of the patient charts. Navigators are trained on how to use the electronic medical record (EMR) and security and confidentiality protocols. They are also trained on how to take minimal case notes that document each engagement with their clients into a brief summary. Training also includes how to use a "charting by exception" format, which allows for a summary of the overall discussions without documenting any potentially illegal activities shared by the client. For example, when Paola reports she is having unprotected sex without telling her partners she is HIV-positive, the peer health navigator, Hua, documents that she and Paola talked about ways to disclose and make sex safer.*

> **RECOMMENDATION 16a:** Develop a new or adapt an existing documentation policy. (Type of evidence: practice)

Evidence

This recommendation emerged from the practice expertise of the working group.

Meeting attendance

RECOMMENDATION 17: Peer health navigators attend relevant meetings. This includes ongoing trainings, case conferences, mentoring, debriefing, support, team meetings and supervision meetings. (Type of evidence: research and practice)

Evidence

Peer health navigators are members of clients' healthcare teams and, as such, participate in team meetings.[86,97,118,120,122,139,145] This can include staff meetings,[97,122,139,145] meetings with program supervisors,[118,145] and meetings with specific staff to discuss services and referral processes.[86]

Policy compliance

RECOMMENDATION 18: Peer health navigators comply with all agency policies (e.g., communication and punctuality). (Type of evidence: practice)

Evidence

This recommendation emerged from the practice expertise of the working group.

RECOMMENDATION 18a: Develop a new or adapt an existing communication policy that outlines how and how often peer health navigators are expected to communicate with their program supervisors. (Type of evidence: practice)

Evidence

This recommendation emerged from the practice expertise of the working group.

RECOMMENDATION 18b: Develop a new or adapt an existing punctuality policy for peer health navigators. (Type of evidence: practice)

Evidence

This recommendation emerged from the practice expertise of the working group.

Client-centred service delivery

RECOMMENDATION 19: Peer health navigators take a client-centred approach to the work that is consistent with program values, such as GIPA/MEPA, trauma-informed practice, harm reduction, anti-oppression, self-determination and resiliency. (Type of evidence: practice)

Evidence

This recommendation emerged from the practice expertise of the working group.

Self-care maintenance

RECOMMENDATION 20: Peer health navigators proactively engage in preventative self-care and are attentive and responsive to other self-care needs as they arise. This includes taking advantage of self-care options available through the peer health navigation program and other community services. Self-care needs are culturally based, and should be addressed through relevant self-care and health promotion actions. (Type of evidence: practice)

Evidence

This recommendation emerged from the practice expertise of the working group.

> **VIGNETTE**   *Rima, the peer navigator at a local agency, can take personal time and sick leave like all staff in accordance with the agency's collective agreement when she needs it for self-care. The agency also acknowledges that equity and access to services are important factors in supporting the empowerment of all peers who work at the agency. Alia, the program supervisor, acknowledges the challenges Rima is currently facing as a peer health navigator and within her personal life. As her supervisor, Alia talks to Rima to ensure she is continuing to find time to access services at the host agency and other agencies to maintain her self-care. She also encourages Rima to use her personal time and sick leave for self-care if she needs to.*

Chapter 2
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