

Role Play Observation Checklist					
Cancer Patient Navigator		Observer	Date		
Competency Question	Standards	Yes	No	N/A	
1. Greeted and welcomed client and family?	Said hello or welcome				
	Addressed the client by name				
	Welcomed anyone accompanying the client				
2. Assessed client and family needs?	Asked open-ended questions.				
	Maintained conversational tone to minimize feelings of being interrogated				
	Assessed key potential barriers to care.				
	Helped the client formulate questions for physician and other providers.				
3. Developed plan?	Engaged the client in goal setting and prioritization.				
	Assisted client in establishing detailed and coordinated plan.				
	Collaboratively assigned tasks and responsibilities with time frames, and planned follow-up.				
4. Provided referrals as appropriate?	Demonstrate knowledge of programs, eligibility and skill in obtaining resources				
	Arranged appointment for the client				
	Wrote the date and time of the appointment on a card for the client if needed				
	Conducted follow-up to ensure service received.				
	Intervened as necessary to assist client in obtaining services				
5. Encouraged patient to participate and take responsibly for care independently or with assistance?	Modeled to client how and where to locate information.				
	Asked client who and how others will be involved.				
	Encouraged client and family to take responsibility				
6. Communicated in a respectful and understandable manner?	Treated client and family with respect.				
	Did not use jargon or acronyms				
	Spoke distinctly at a comfortable pace.				
	Asked “do you have any questions?”				
7. Documentation and data entry	Data entry is thorough and completed the same day of client interaction				
	Data are accurate				