



Resource Navigator Manual

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I. Introduction

Launched in January 2015, Community Partnerships for Healthy Mothers and Children (CPHMC) is a three-year project administered by the National WIC Association (NWA) that aims to reduce and prevent chronic disease by improving access to healthy food environments and disease management and prevention services. NWA is funding and supporting two cohorts of local WIC agencies—32 agencies in total—in select target states to work with community partners to build and enhance community coalitions, perform community needs assessments, and develop and implement community action plans to achieve community health goals.

The CPHMC project is part of a larger national effort known as National Implementation and Dissemination for Chronic Disease Prevention (DP14-1418), a \$28 million initiative funded by the Centers for Disease Control and Prevention (CDC) to prevent and control chronic diseases through population-based strategies at the community level. CCI Health and Wellness Services is among the 17 local WIC agencies selected for the first cohort of CPHMC.

As an awardee, this project will allow CCI Health & Wellness Services to work with other community stakeholders to implement population-based strategies that will increase opportunities for chronic disease prevention through community and clinical linkages in our community. We're focusing on getting our WIC population to utilize services/resources that will prevent chronic disease by having the Resource Navigator become a bridge between WIC and CCI-Medical and Dental. Essentially, this individual will be the link that families need to go from one service to the next.

II. Job Description

POSITION SUMMARY:

The Resource Navigator will perform a variety of tasks to assist families in the Women, Infant and Children (WIC) program. The Resource Navigator will link WIC participants to services offered by CCI Health & Wellness Services including primary care, prenatal care, behavioral health services, dental care and other community resources. This will include identifying specific needs of the WIC participant, connecting them to services, and following up with them about the utilization of the service. This position helps integrate all services offered by CCI Health & Wellness Services and the community to improve the overall health of WIC participants.

POSITION REQUIREMENTS:

A. Minimum Education Requirement:

Student/recent graduate who is pursuing or received Bachelor's/Master's degree from an accredited college or university, preferably in Public Health, Community Nutrition, Social Work or other related field.

B. Minimum Requirements:

Must be dependable and punctual with friendly attitude. Previous experience working with low-income, multi-cultural populations. Experience with computer use including word processing and spreadsheets. Good oral and written communication skills. Demonstrated capabilities in working effectively with other staff. Ability to organize and willing to take initiative. Ability to respect and maintain confidentiality of families, CCI Health & Wellness Services and other community partners. Spanish fluency preferred.

DUTIES AND RESPONSIBILITIES:

- Identify needs of WIC participants and appropriately refer them to CCI Health & Wellness Services including but not limited to primary care, prenatal care, behavioral health services, dental care and other community resources as deemed necessary
- Effectively communicate with WIC participants and other staff members

- Accurately document referrals with data tool
- Provide excellent customer service
- Follow up with WIC participants to confirm utilization of service referred to and provide additional assistance as needed
- Assist in updating resources guide by verifying information is accurate (as needed)
- May participate in outreach activities, such as lectures in schools, Health Fairs and other activities to promote the CCI Health & Wellness Services/WIC Program goals throughout the community

III. Policies and Regulations

If WIC Staff identify that the family needs for additional resources such as primary care, dental, etc. Staff will refer to the Resource Navigator who will then provide further resource information in Montgomery County and/or direct family to other services within CCI Health & Wellness Services.

A referral form will be given to WIC Staff who will identify additional services the family needs. Any additional services needed will be identified on the form to be collected by the Resources Navigator. Once the form is collected it will be given to the project coordinator who will place the form in a secure area.

On the referral form there is a consent section where it states the family is not obligated to receive additional resources. If the family would like to additional resources then the navigator will ask for the participants' telephone number and name to follow up with the family's utilization of the services. The Resource Navigator will then enter information in secured online data base.

Since all WIC centers are different in size and capacity, the Resource Navigator will be placed various locations within the center that will be conducive to clinic flow.

In regards to CCI's volunteer policy and regulations, the following requirements apply to all volunteers who will be serving at CCI locations:

- A) Training Videos: 1) HIPAA 2) Cultural Competency 3) Blood Borne Pathogens
 1. HIPAA ensures that patient privacy is secure and maintained.
 2. Cultural Competency ensures that volunteers interacting with staff, patients, and any other external activity mirror CCI's mission as an organization. It also ensures that all CCI representatives are held to the same expectations.
 3. Blood Borne Pathogens provides appropriate readiness for such an event to take place in clinics.
- B) Background Check Consent
 1. Background check is a security of any history a volunteer may have that could place CCI in a risky situation.
- C) Required Immunizations: 1) Influenza 2)PPD/Tuberculosis Skin Test 3)Hepatitis B Series
 1. Immunization records allow CCI to assure that our patients are not exposed to possible transferable infections or disease.

III. Documentation

Our practice engages with an assortment of significant health and community services to improve patient care. An operational referral system ensures a tight relationship between all services and assists individuals to receive quality care. The participant will receive information on the reasons and importance of referral, how to get to the receiving facility, who to see, and what the next steps are.

The following is an example of the referral form WIC Staff will bring to the Resource Navigator:

CCI-WIC Health Needs Referral Form

Healthcare Needs

- Primary Care
- Family Planning
- Prenatal
- TAYA
- Dental
- Health Insurance

Nutrition Services

- SNAP
- Food Assistance
- Farmers' Market

Other Services:

Other: _____

Comments:

I hereby authorize CCI Health and Wellness Services to obtain the following information to better support me and my family while connecting to others services.

Participant ID#: _____

Telephone #: _____

- Best time and date for contact: _____

Date of Service: _____

I understand that my authorization will remain confidential and the information will be handled in compliance with all federal laws.

By signing this I certify that I read and understood the nature of this release form.

(Participant) Print Signature Date

Office Use: _____

Print Signature Date

- Resource Navigator WIC Staff
- In Person Phone Initial Visit Follow Up

It's crucial to document referrals in order to address each participants unmet needs, and ultimately to protect them from getting lost in the system. Below is an example of the instrument that will be used in order to accurately document the referral:

Referral Date	Participant's Name	WIC ID #	Telephone #	Referred to...	Reason	Follow Up Date	Notes
08/12/2015	Jane Smith	000-000-000	000-000-0000	CCI Primary	Well visit	08/14/2015	xxxxxxxx

A) Definition of Terms

- a. Date of Referral: The actual date the participant was at the office
- b. Participant's Name
- c. WIC Identification Number: The WIC ID number is listed on the WIC folder, it's a 9 digit number
- d. Telephone Number: Ask for the best number the individual can be reached at
- e. Referred to: List the service the individual will be utilizing
- f. Reason: List what type of care; for example well visit, food assistance, etc.
- g. Follow Up Date: Should be done within a week to see if referral was helpful
- h. Notes: Anything that was discussed at the one on one or the follow up call

B) Outcomes

Essentially we must know *the NUMBER of* individuals being **REFERRED TO** services and the *NUMBER of* many of those individuals **UTILIZING** services. This is vital so we are able to track if the referral system is effective.

IV. Miscellaneous

A. Language

Many times participants are able to communicate with proficient or intermediate English however there will be cases that participants will not speak any English.

In this event:

- 1. Kindly ask WIC staff to help with translation if a staff member is fluent in the participant's native language

2. You may use the Language Line however you must ask the project coordinator for permission.

B. Absent

1. When a Resource Navigator is not in the center, WIC staff will provide the referral information, such as the community resource guide. WIC staff will also need to record the name of participant, referral date, and what service was offered.
2. They must give that information to the Resource Navigator who will then follow up with individual and record the information in tool.

C. Expectations

1. Accountability: It's vital for Resource Navigators to **ACCURATELY DOCUMENT** every individual they assist. Project Coordinator will provide assistance if needed.
2. Schedule: A set schedule is necessary for the Resource Navigator to ensure WIC staff is aware of the days and times a Resource Navigator will be in the center.
3. Customer Service: The Resource Navigator is expected to be friendly and, positive and courteous. Be a good listener by engaging through eye contact and reflective listening. Guide them through the process and avoid assumptions!

V. Work Flow Chart

