

PART I	HAWAII HEALTH SYSTEMS CORPORATION	2.160
	STATE OF HAWAII	2.161
		2.162

Class Specifications
For the Classes:

PATIENT NAVIGATOR I, II, III
SR-16, SR-18, SR-20
BU:13

PATIENT NAVIGATOR I 2.160

Duties Summary:

Serves in a trainee capacity, receiving formal and on-the-job training to assist patients navigate through the healthcare system and providing assistance and support to clinical and ancillary departments. Responsible for reviewing and processing all incoming and outgoing referrals, tracking referral status, and ensuring timely follow up; and performing other duties as required. May be required to work on weekends and holidays and/or travel to various facilities within the region to meet operational needs.

Distinguishing Characteristics:

This is the entry-trainee level in the Patient Navigator series, which is designed to provide a career-oriented introduction to help with a patient's experience in the healthcare system. Work assignments are specific, limited, routine, and designed to provide initial experience in a variety of activities. Assignments are made concurrently with orientation and training and supervision is close and immediate.

Examples of Duties: (*The following are examples of duties and are not necessarily descriptive of any one position in this class. The omission of specific duties statements does not preclude management from assigning such duties if such duties are a logical assignment for the position*).

- Learn the principles and practices, concepts, work processes, regulations and reference materials for the patient navigator role;
- Under close supervision
 - Reviews and processes all incoming and outgoing referrals,
 - Enters and verify patient demographic and insurance information,
 - Assigns referrals to the appropriate provider and patient as needed,
 - Updates referral status and document outcomes, ensure closure of the referral loop,
 - Monitors pending referrals to ensure timely scheduling and follow-up;
- Ensure accurate data entry, prompt communication, and consistent documentation;

- Perform various administrative tasks such as answering phones, compiling data, preparing reports and correspondence, copying and filing documents, procuring supplies, and attending meetings;
- Adhere to all relevant laws and regulations regarding confidentiality;
- Perform other related duties as required.

Knowledges and Abilities Required:

Knowledge of: Learn hospital policies and procedures; applicable State, Federal and other regulatory requirements and health laws; Business English, spelling, grammar and word usage; office practices and procedures; filing methods and systems; the operation and operational maintenance of various office appliances and equipment, including copying machines; use of computer equipment and software applications; principles and practices of customer service and public relations; Health Insurance Portability Accountability Act (HIPAA) regulations.

Ability to: Learn and maintain an effective work pace under periodic deadlines; learn to manage multiple tasks; learn and apply pertinent statutory provisions, rules, regulations, policies and procedures and other requirements; read and interpret manuals and other detailed books of instruction; use of computers, word processing and other software applications; communicate effectively orally and in writing and deal tactfully with others; and learn to manage competing priorities.

PATIENT NAVIGATOR II

2.161

Duties Summary:

Performs a variety of activities including reviewing and processing all incoming and outgoing referrals, tracking referral status, and ensuring timely follow up; and performs other duties as required. May be required to work on weekends and holidays and/or travel to various facilities within the region to meet operational needs.

Distinguishing Characteristics:

This is the first level of the independent worker in this series. Professional functions include understanding the Patient Navigator processes, medical terminology, and types of incoming and outgoing referrals. The employee performs a variety of assignments, which involve routine to moderately difficult work. Supervision received at this level varies with the newness and complexity of the assignment and the progress made. Routine assignments may be performed independent of continual supervision.

Examples of Duties: (*The following are examples of duties and are not necessarily descriptive of any one position in this class. The omission of specific duties statements does not preclude management from assigning such duties if such duties are a logical assignment for the position*).

- Help patients navigate the healthcare system to reduce service fragmentation and ensure timely access to care and providers;
- Establish close relationship with and serves as the primary point of contact for patients;
- Review and processes all incoming and outgoing referrals;
- Enter and verify patient demographic and insurance information and secures necessary authorizations;
- Assign referrals to the appropriate provider and patient as needed;
- Update referral status and document outcomes, ensure closure of the referral loop;
- Monitor pending referrals to ensure timely scheduling and follow-up;
- Assist in coordinating patient referrals to specialty providers;
- Facilitate communication between patients, caregivers, referring providers, and insurance companies;
- Ensure accurate data entry, prompt communication, and consistent documentation;
- Work closely with the healthcare team, which may include physicians, nurses, and other clinical staff to support positive patient outcomes;
- Perform various administrative tasks such as answering phones, compiling data, preparing reports and correspondence, copying and filing documents, procuring supplies, and attending meetings;
- Adhere to all relevant laws and regulations regarding confidentiality;
- Perform other related duties as required.

Knowledges and Abilities Required:

Knowledge of: Good working knowledge of Hospital policies and procedures; applicable State, Federal and other regulatory requirements and health laws; Business English, spelling, grammar and word usage; office practices and procedures; filing methods and systems; the operation and operational maintenance of various office appliances and equipment, including copying machines; use of computer equipment and software applications; principles and practices of customer service and public relations; Health Insurance Portability Accountability Act (HIPAA) regulations; the nature and uses of medical terminology and electronic medical records.

Ability to: Maintain an effective work pace under periodic deadlines; manage multiple tasks; understand and apply pertinent statutory provisions, rules, regulations, policies and procedures and other requirements; read and interpret manuals and other detailed books of instruction; proficient use of computers, word processing and other software applications; communicate effectively orally and in writing and deal tactfully with others; and manage competing priorities.

PATIENT NAVIGATOR III

2.162

Duties Summary:

Serves as the primary contact for coordinating patient referrals to specialty providers. Performs moderately difficult professional work focusing on the quality and accuracy of incoming and outgoing referrals. Responsibilities include but not limited to helping patients overcome the obstacles that they may encounter while pursuing treatment, spending time communicating with patients and their families, and guiding the patient through the healthcare processes and performs other duties as required. May be required to work extended hours, including weekends and holidays and travel to various facilities within the region to meet operational needs.

Distinguishing Characteristics:

This is the fully independent worker in this series. Professional functions include analyzing the healthcare process to reduce service fragmentation and ensure timely access to care and providers. May act as a patient advocate to establish relationships, resolve issues, direct patients to both internal and community resources, and assist patients in learning how to navigate the healthcare system independently. Supervision received at this level is of a general nature, thereby requiring that assignments be performed independently.

Examples of Duties: (*The following are examples of duties and are not necessarily descriptive of any one position in this class. The omission of specific duties statements does not preclude management from assigning such duties if such duties are a logical assignment for the position*).

- Support patients in accessing healthcare and navigating health systems;
- Identify obstacles to care and collaborate with patients and caregivers to find viable solutions;
- Coordinate appointment scheduling with various healthcare providers as needed;
- Responsible for reviewing and processing the routine to moderately difficult incoming and outgoing referrals;
- Refer patients to and collaborate with other private or public agencies, including medical service providers and support programs, as appropriate;
- Effectively communicate the purposes and available services to patients, their families, and caregivers;
- Guide patients in self-management and problem-solving, empowering them and their families to achieve optimal wellness and independence;
- Assist patients in securing the most beneficial and cost-effective healthcare to improve their health, safety, productivity, and overall quality of life;
- Maintain up-to-date records that reflect patient progress while receiving Patient Navigator services;

- Help patients obtain and retain all eligible benefits necessary for continuity of care and appropriate service levels;
- Prepare and keep accurate and comprehensive patient documentation;
- Generate related reports as needed;
- Ensure thorough and accurate documentation of patient interactions as required by state, county, or grantor regulations and standards;
- Participate in training sessions, conferences, and meetings to enhance knowledge and skills;
- May perform various administrative tasks such as answering phones, compiling data, preparing reports and correspondence, copying and filing documents, procuring supplies;
- Adhere to all relevant laws and regulations regarding confidentiality;
- Perform other related duties as required.

Knowledge and Abilities Required:

Knowledge of: Good working knowledge of hospital policies and procedures; applicable State, Federal and other regulatory requirements and health laws; Business English, spelling, grammar and word usage; office practices and procedures; filing methods and systems; the operation and operational maintenance of various office appliances and equipment, including copying machines; use of computer equipment and software applications; principles and practices of customer service and public relations; Health Insurance Portability Accountability Act (HIPAA) regulations; the nature and uses of medical terminology and electronic medical records.

Ability to: Plan and carry out a wide range of administrative functions, including various highly complex assignments; maintain an effective work pace under periodic deadlines; effectively manage multiple tasks; interpret and apply pertinent statutory provisions, rules, regulations, policies and procedures and other requirements; read and interpret manuals and other detailed books of instruction; proficient use of computers, word processing and other software applications; communicate effectively orally and in writing and deal tactfully with others; and organize and prioritize a variety of competing projects.

This is the first class specification approved for the class, PATIENT NAVIGATOR I, II, and III effective August 6, 2025.

APPROVED: Aug 5, 2025

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