

# Health Advocacy & Care Navigation Services

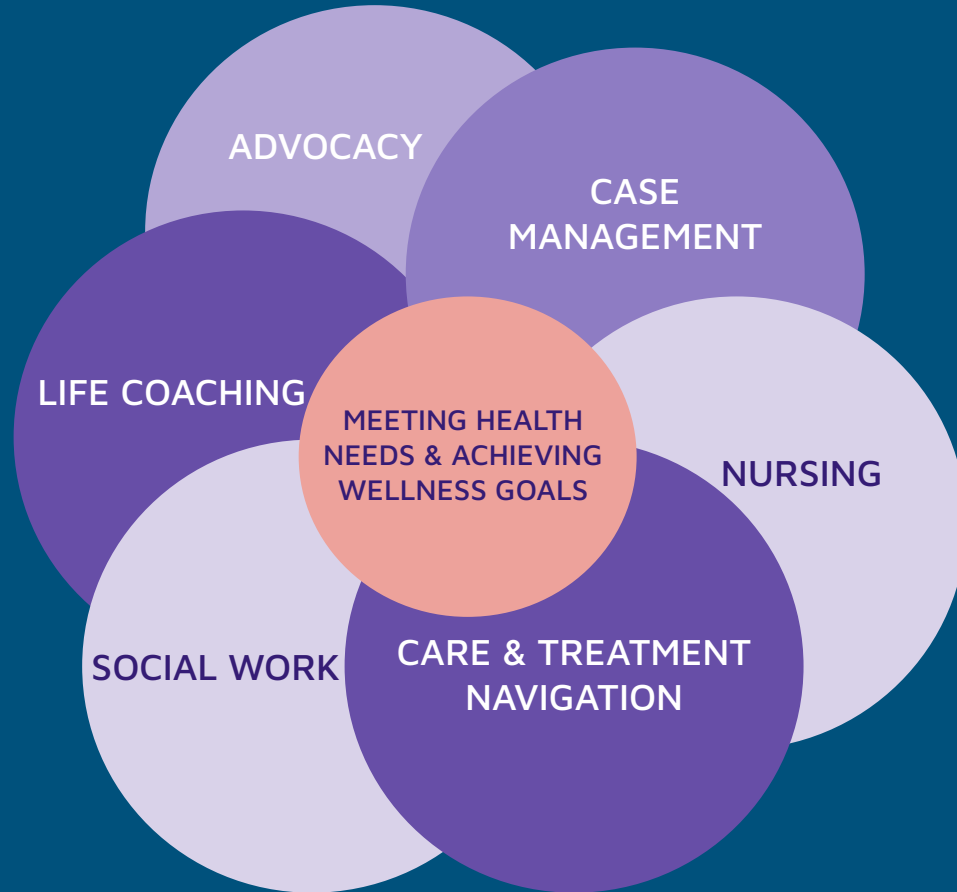
## 5 Case Studies: Common Problems and How to Solve Them

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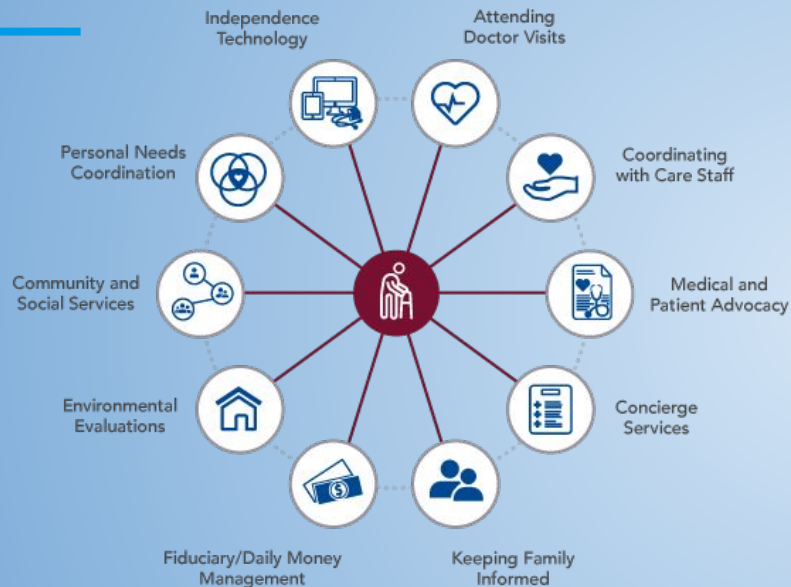
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SCOPE  
& FUNCTIONS:  
MERGING ROLES  
FOR A HOLISTIC  
APPROACH



# Identifying Client Needs and Providing Services

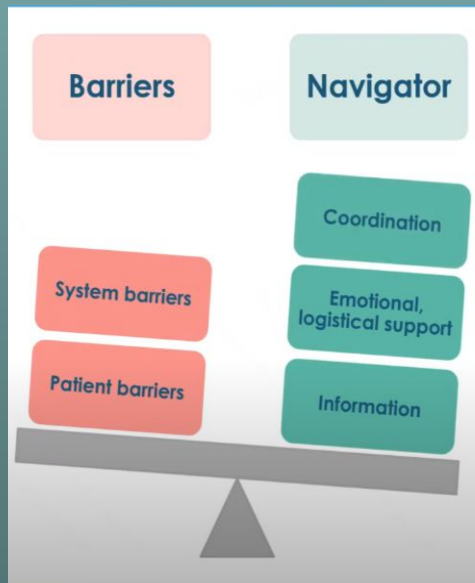


Credit: Ikor of Western Pennsylvania

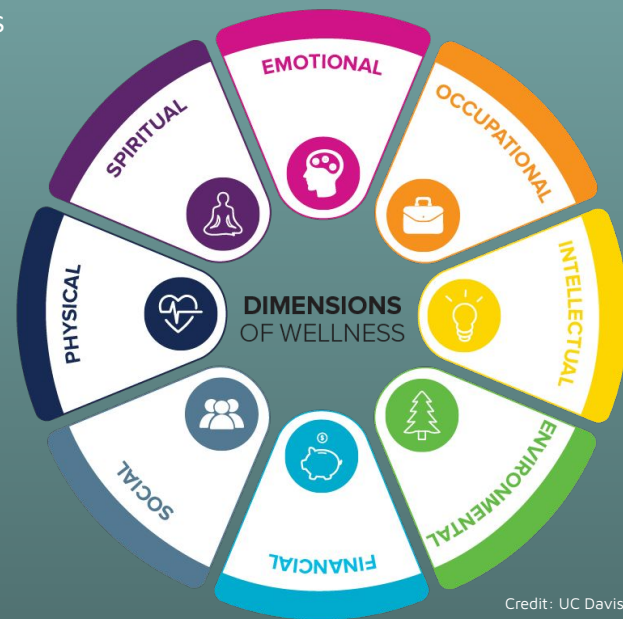


Credit: Simplifying the Journey

# Core Values of Health Advocacy & Care Navigation



- **Ascertain client needs and goals**
  - Identify and address health disparities
  - Streamline the healthcare experience
  - Unburden the client and the healthcare system
  - Increase health system efficiency
- Support **client and family wellness**
- Identify rigorous, high-level research evidence and explain it in simple, understandable terms
- Provide knowledge and resources for clients to make **informed healthcare decisions**
- Find **high-quality providers and services**
- Meet health needs & achieve wellness goals



Credit: UC Davis

# Major Systemic Problems

- **Low Healthcare Literacy**

- The CDC defines healthcare literacy as an individual's ability to find, understand, and use information and services to inform health-related decisions.

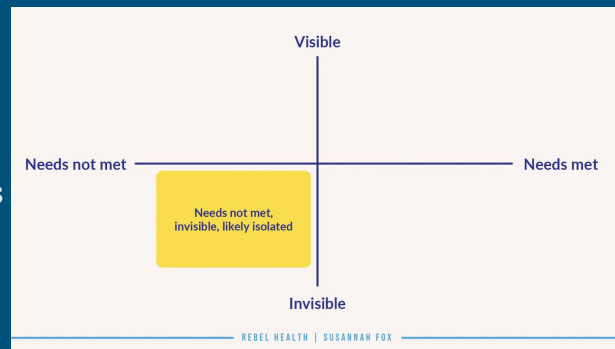
- **High Costs**

- **Health Systems Working at or Beyond Capacity**

- Inefficiency in cost & care
- Inadequate primary care providers
  - Overburdened providers, urgent cares & emergency rooms
  - Insufficient face-to-face time between clients and providers causes worse health outcomes
  - Complicated diagnoses secondary to lack of time, misdiagnosis, untreated conditions
- Excessive lead time for care/treatment
- High provider burnout & low retention rates

- **Disparities**

- Limited Access to Care and Information
- Language & Cultural Barriers
- Discrimination
- Insurance Type & Status
- Insufficient Funding & Research of Particular Populations, Conditions, etc.



# CLIENT # 1

## Background

14 year old female with generalized anxiety and school refusal. Recent completion of 8-day stay at in-patient psych facility followed by 5 months in partial hospitalization program.

## Reasons for Seeking Help

- Family feels they have **exhausted all options**
- **"Don't know what they don't know"**-In search of resources and answers but without knowing where to look or what to look for
- Prevent intervention by Child Protective Services

## Services Provided

- Comprehensive review of medical & school records
- **Clinical assessment & findings**
- **Coordinating care and services including insurance benefit navigation**
- Medication & Treatment Management
- Communication with providers
- Scheduling/attending appointments
- Literature review
- **Client Education**
- Collaboration with school district in formulating Individualized Education Program (IEP)
- **Emotional support & coping strategies for client and family members**

# CLIENT # 2

## Background

72 year old female with neurocognitive degeneration, decreased appetite, malnutrition, and loss of speech

## Reasons for Seeking Help

- Overwhelmed by complex diagnoses, care coordination, and treatment management
- Safety precautions- prevent accidents and injury
- Improve appetite and nutrition status
- **"Don't know what they don't know"**-In search of resources and answers but without knowing where to look or what to look for

## Services Provided

- Comprehensive Review of Medical Records
- Clinical Assessment & Findings
- Coordinating Care and Services
- Medication & Treatment Management
- Communication with Providers
- Attending Appointments
- Literature Review
- Client Education
- **Emotional support & coping strategies for client and family members**
- **Therapeutic communication**
- End of Life Care Navigation

# CLIENT # 3

## Background

69 year old female with attention deficit disorder (ADD), complex trauma, and former substance use. Recent death of her mother and subsequent falling out with siblings over estate division.

## Reasons for Seeking Help

- Life Coaching
  - Better time management
  - Organization skills
- **"Don't know what they don't know"**-In search of resources and answers but without knowing where to look or what to look for
- Consulting for remediation with siblings

## Services Provided

- Comprehensive review of medical records
- **Clinical assessment & findings**
- Coordinating care and services
- Medication & Treatment Management
- Literature review
- Client Education
- **Life coaching**
- **Emotional support & coping strategies for client and family members**
- **Therapeutic communication**



# CLIENT # 4

## Background

19 year old female with cerebral palsy, epilepsy, severe cognitive dysfunction, who is wheelchair bound, unable to speak and requires a feeding tube. Multiple orthopedic surgeries, chronic urinary tract infection, impaired upper airway clearance & chronic respiratory infections with frequent hospitalizations.

## Reasons for Seeking Help

- Direct care
- Care navigation
- Treatment management
- **"Don't know what they don't know"**-In search of resources and answers but without knowing where to look or what to look for

## Services Provided

- Comprehensive review of medical records
- **Clinical assessment & findings**
- Coordinating care and services
- Medication & Treatment Management
- Literature review
- Client Education
- **Emotional support & coping strategies for client and family members**
- **Therapeutic communication**

# CLIENT # 5

## Background

73 year old male suffering from an injury sustained while sleeping. Use of sleep aid Ambien. Excessive alcohol use and treatment nonadherence. Lives abroad and has family in the US.

## Reasons for Seeking Help

- Overwhelmed by navigating healthcare system
- Inadequate understanding of hospitalization processes, chain of command
- Care navigation
- Treatment management
- **"Don't know what they don't know"**-In search of resources and answers but without knowing where to look or what to look for

## Services Provided

- Traveling to be with the patient while hospitalized and traveling with him to the US
- Comprehensive review of medical records
- **Clinical assessment & findings**
- Navigation of care and services
- Medication & treatment management
- Literature review
- Client & family education
- **Emotional support & coping strategies for client and family members**
- **Therapeutic communication**

# Tailored Approach That Stands Alone

## Addressing Needs & Solving Problems

### PROBLEMS

- A. The patient is not the customer
  - a. Most Navigators, Advocates, and Case Managers work for Insurance Companies and Hospitals with their own agendas
  - b. Patient goals are often not the priority
- B. Navigating the health system is overwhelming, confusing, and time-consuming
- C. Low Health Literacy
- D. Incomplete Assessment & Unmet Needs
- E. Inadequate support for the client and their family
- F. Providers and Clients assume they need to use local services
- G. Burdensome, Inefficient System

### SOLUTIONS

- A. Privately-owned to work directly for the client to prioritize their needs and goals
- B. Streamlined Navigation
  - a. Insurance Benefits, Authorizations, Appeals
  - b. Care: Finding high quality, appropriate providers & services
- C. Clinical Expertise
  - a. Clinical Assessment
  - b. Identifying Needs that may have been missed- known & unknown to the client
  - c. Client Education & Resources
  - d. Informed Decisions
- D. Comprehensive Wellness Assessment
- E. Support Resources, Wellness & Life Coaching
- F. Services available to clients worldwide
- G. Optimizing the Client-Provider Interaction