

CARE Companions™ Volunteer Handbook

Patient Navigation & Health Literacy Program

YouEmpowered

1. Welcome

Welcome to CARE Companions™. This program helps patients who receive care at free clinics or clinics serving underserved communities. As a CARE Companion, you support patients by helping them understand their care, follow through on next steps, and feel more confident navigating the healthcare system.

You are not a medical provider. Your role is to support, explain, and empower patients safely and ethically.

2. Your Role

CARE Companions help patients by: - Explaining care instructions in plain language - Helping patients prepare questions for visits - Supporting referral and follow-up completion - Identifying and documenting barriers to care

You do **not** give medical advice or opinions.

3. Scope of Practice

You May:

- Review visit summaries with patients
- Explain next steps already given by a clinician
- Help schedule appointments
- Document patient questions or barriers

You May Not:

- Give medical advice
- Interpret test results
- Recommend treatments or medications
- Share personal opinions about care

If you are unsure, pause and escalate to a supervisor.

4. Ethics & Professional Conduct

- Respect patient choices
 - Keep all patient information private
 - Be honest about your role
 - Maintain professional boundaries
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5. Health Literacy Basics

Many patients feel confused after medical visits. This is normal. Stress, fear, and complex language make understanding harder.

Your job is to: - Use clear, simple language - Break information into small parts - Focus on what happens next - Check understanding using teach-back

6. Communication Guidelines

- Listen carefully
- Ask open-ended questions
- Avoid interrupting
- Validate patient feelings

Example: “That sounds overwhelming. Let’s go through it together.”

7. Cultural Humility

Patients come from many backgrounds. Be respectful and curious.

- Do not make assumptions
 - Respect cultural beliefs
 - Acknowledge past negative experiences
 - Ask, don’t assume
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8. Referral & Navigation Support

Referrals can be confusing.

You can help by: - Explaining what a referral is - Reviewing appointment steps - Identifying barriers like cost or transportation - Letting clinic staff know when patients are stuck

9. Patient Empowerment

Your goal is to help patients feel confident.

- Help patients write down questions
 - Encourage them to speak up
 - Support shared decision-making
 - Never tell patients what choice to make
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10. Documentation

Accurate notes help the program improve.

- Use clear, factual language
 - Write what the patient said or did
 - Do not add opinions or diagnoses
 - Document as soon as possible
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11. Privacy & Confidentiality

- Use approved systems only
 - Do not share patient information
 - Protect written and digital records
 - Report privacy concerns immediately
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12. Case Vignettes

Oncology Case

Situation: A patient with breast cancer receives a referral for oncology but does not schedule the appointment.

CARE Companion Role: - Ask what concerns they have about the referral - Explain what an oncology visit usually involves (without giving advice) - Identify barriers such as fear, cost, or transportation - Report barriers to clinic staff

Cardiology Case

Situation: A patient with high blood pressure is confused about follow-up visits and lifestyle instructions.

CARE Companion Role: - Review visit instructions in plain language - Help the patient list questions for the next appointment - Encourage attendance at follow-up - Avoid giving diet or medication advice

Primary Care Case

Situation: A patient misses a follow-up appointment for diabetes management.

CARE Companion Role: - Ask what made it hard to attend - Help reschedule if appropriate - Identify barriers such as work schedule or transportation - Document and escalate if needed

13. Supervision & Support

You are never alone in this role.

- Attend monthly check-ins
 - Ask questions early
 - Seek guidance when unsure
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14. Certification & Expectations

To stay certified, you must: - Follow program rules - Maintain professionalism - Complete required training updates

Violations may result in removal from the program.

15. Commitment Statement

As a CARE Companion™, you agree to support patients with respect, honesty, and care while staying within your role and protecting patient safety.

End of Handbook