

UCHC Competency Checklist: ORIENTATION

Position Title: OFFICE ASSISTANT

Employee Name: _____

Unit: CSDU/ICU

Cluster Area: _____

Method of Instruction Key: P = Protocol/Procedure Review E = Education Session S = Self Learning Package C = Clinical Practice D = Demonstration	Method of Evaluation Key: O = Observation (in clinical setting) RD = Return Demonstration T = Written Test V = Verbal Review	Self-Assessment by Employee			Validation of Competency		
		Never Done	Needs Review/ Practice	Competent	Method of Instruction (Use Instruction Key on Left)	Date	Initials
All Core Competencies reviewed and documented in Central Orientation							
A. GETTING INTO THE SYSTEM							
Meets the following staff members of the unit:							
Staff Office Assistants							
Assistant Nursing Managers							
Nurse Practitioners							
Clinical Nurse Specialist							
Social Worker							
Unit Case Manager							
Locates the following:							
Nursing Manager's Office / Mailbox							
Time Sheets and Request Book							
Educational Activity Record File							
Safety Manual							
Emergency Fire Extinguishers							
Fire Pull Box							
All exits from the unit							
Infection Control Manual							
Code Cart							
EKG Machine							
Defibrillator							
Hospital Administrative Manual							

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Nursing Practice Manual								
Review the Health Unit Clerk Manual								
Unit Policy and Procedure Manuals								
Charts and Chart Rack								
Clerk's Daily Worksheet								
Patient's White Plastic ID Card								
Addressograph								
Supplies, File Cabinet, Back-Up Supplies								
Midnight Census								
Nurses' Kardex								
Small Census Kardex								
Phone numbers for patient rooms								
Diet sheet								
MAR								
Pharmacy basket								
Weight board								
Miscellaneous filing basket								
Mail basket								
All unit telephone extensions								
Emergency Department								
Nursing Office								
Radiology								
Pharmacy Department								

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Blood Bank									
Hematology									
Clinical Chemistry									
Drug Analysis									
Microbiology									
Medical Records Department									
Copy Center									
ICU/CSDU									
Cath Lab									
Nuclear Medicine									
Cardiopulmonary									
Respiratory									
Chapel									
Red Lab Book									
B. RECEPTIONIST DUTIES:									
Answers telephone according to UCHC standard									
Adheres to Customer Service Standards									
Demonstrates mechanism to access the call pick-up function									
Demonstrates mechanism to transfer calls									
Demonstrates mechanism to place a call on hold									
Demonstrates mechanisms to conduct a conference call									
Demonstrates the mechanism to access the JDH beeper system									
Arranges a Service Call on an Inpatient Unit (i.e., call Facilities Management, BME, etc.)									
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C. ADMISSION PROCEDURE:								
Accesses patient movement function on the hospital computer system to admit a patient to the appropriate bed								
Notifies the resident of the patient's arrival								
Notifies the RN of the patient's arrival								
Assembles an inpatient chart								
Updates white board								
Places patient's name on midnight census report – under new admission								
Places patient's name on diet sheet								
Notifies dietary department of a new admission								
Places new admission's name on small census kardex								
Writes intern's name and/or service next to patient's name								
Places physician orders in the pharmacy basket								
Makes out a black book for the new patient								
Places a stamped flowsheet and patient charge, primary sheet (ICU) in the black book								
Enters patient name into monitor system								
Begins filling out large kardex								
Calls Medical Records for prior inpatient or ambulatory records								
TRANSFER A PATIENT WITHIN JOHN DEMPSEY HOSPITAL								
Transfer in:								
Accesses patient movement function on the hospital computer system to transfer a patient into the unit								
Assembles necessary paperwork for a patient transfer								

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Copies and collates necessary paperwork for a patient transfer according to the unit admission protocol							
Transfer Out:							
Notifies appropriate personnel in preparation for transfer							
Copies and collates necessary paperwork for a patient transfer							
Places patient's name on midnight census report							
Logs patient off Philips Monitor if applicable							
Logs patient out in discharge / log book							
Accesses patient movement function on the hospital computer system to transfer a patient out of the unit							
DISCHARGE A PATIENT:							
Discharge to Home:							
Accesses the patient movement function on the hospital computer system to discharge a patient from the unit							
Places patient's name in a discharge / log book							
Places inpatient chart in medical records rack							
Faxes Clinical Resume to appropriate JDH physicians and clinics							
Places journal in the basket addressed to University Physicians							
Places patient's name on the midnight census report – under Discharge							
Crosses out patient's name on the diet sheet							
Notifies dietary of patient's discharge							
Removes patient's name from the small census kardex							
Notifies ANM / Charge Nurse of discharge							
Notifies admitting department of patient's discharge							

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Reorganizes patient chart post-operatively								
Routine Clerical Functions:								
Transcribes physicians orders onto the nursing kardex								
Transcribes medication orders onto the MAR								
Identifies and fills in clerical section on the following appropriate forms/ requisitions:								
Lab requisitions								
EKG/ECHO								
Radiology								
MRI								
Cat Scan								
Nuclear Medicine								
EEG/EMG								
Blood gas								
Holter monitor								
Stress test								
PFTs								
Transcribes appropriate information onto the clerk's daily worksheet								
Updates lab section on clerk's daily worksheet								
Prepares extra labels for PRN lab work								
Places allergy tape marked with patient's name and allergy on the chart, if an allergy is indicated								
Calls consults for:								
Rehabilitation Services (OT, OT, Speech therapy)								

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Dietary								
Home care – Discharge Planning (CSD)								
Pastoral services								
Monitors patient weight board (CSD)								
Files lab and procedure reports into chart								
Completes diet sheet on a daily basis								
Splits patient charts when necessary								
Prepares form to facilitate medical records department in obtaining patient information from other hospitals, or releasing information from this hospital								
Stocks charts every shift with order sheets, progress notes and vital signs record when needed								
Reviews all charts, stamps any unstamped document and repairs loose sheets								
Stamps and dates flowsheets for all patients every evening								
Communicates a unit status report at change of shift								
Orders supplies and forms as needed including forms from Copy Center								
Obtains requisitions/forms provided by the departments: laboratory requisitions, respiratory/pulmonary, pathology, etc.								
Collates admission packs								
Orders specialty beds								
D. EDUCATION								
Completes HIPAA training								
Completed Age-Specific training								
Completes and passes telemetry class								
Other duties as assigned								

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