

UCHC Competency Checklist: ORIENTATION

Position Title: HEALTH UNIT CLERK (HUC) Employee Name: _____

Unit: Med 4, Surg 7, Onc 6

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			Method of Instruction (Use Instruction Key on Left)	Validation of Competency		
		Never Done	Needs Review/ Practice	Competent		Date	Initials	Evaluation Method (Use Evaluation Key on Left)
All Core Competencies reviewed and documented in Central Orientation								
A. GETTING INTO THE SYSTEM								
Locates Hard Copy Manuals on Unit (Safety, HUC, Specimen Collection)								
Locates On-Line Manuals (NPM, UPM, HAM, Infection Control, Specimen Collection, etc.)								
Obtains Network & Unit Specific Access								
Recalls Proper Call-Out Procedures								
Identifies unit-based orientation plan and timing of evaluations								
Receives PREF for position								
Locates Education Activity Records Binder/File								
Identifies Performance Improvement Indicators								
Places contact information onto disaster call tree & unit phone list								
Meets the following staff members of the unit:								
All of the Health Unit Clerks								
Assistant Nurse Manager								
Charge Nurses								
Clinical Nurse Specialist								
Nurses' Aide/Medical Assistant								
Unit Case Manager								
Unit Social Worker								
Locates the following:								
Nursing Manager's Office								

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Unit's Pharmacy Area								
Unit's Kitchen Area								
Staff Bathrooms								
Lounge – Staff and Patient/Visitor								
Kronos Swipe Reader								
Code Cart								
EKG Machine								
Defibrillator								
Charts and Chart Rack								
Clerk's Daily Worksheet								
Addressograph								
Patient's White Plastic I.D. Card/Addressograph Card								
Supplies, File Cabinet, Back-up Supplies								
Midnight Census								
Nurses' Kardex								
Small Census Kardex								
Phone Numbers for Patient Rooms								
Diet Sheet								
Medication Administration Record (M.A.R.)								
Pharmacy Basket								
Miscellaneous Filing Basket								
Flex Cards (Stickers for labeling charts)								
Mail Basket (Incoming and Outgoing)								

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All Unit Telephone Extensions									
Admitting Department									
Emergency Department									
Nursing Staffing/Payroll Office									
Nursing Administration Office									
Radiology									
Pharmacy Department									
Blood Bank									
Hematology									
Clinical Chemistry									
Drug Analysis									
Microbiology									
Computer Printer/Lab Reports/POE Printer									
Medical Records Department									
Copy Center/Reprographics									
Operating Room									
Anatomic Pathology									
EEG/EMG – Neurology Department									
Nuclear Medicine									
Cardiology Clinic									
Pulmonary Clinic									
Respiratory Department									
Blood Gas Lab									
Chapel									
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UCHC Telephone Book								
Medical Records Basket								
Transportation Basket								
B. SAFETY/INFECTION CONTROL								
Locates fire alarms, extinguishers and exits								
Reviews Safety Plan for unit								
Verbalizes the use and online location of Material Safety Data Sheets (MSDS)								
Verbalizes appropriate role responsibility during a Bomb Threat and Search								
Verbalizes Appropriate Role Responsibility During:								
Code Yellow Alert								
Code Yellow Level I								
Code Yellow Level II								
Code Yellow Level III								
Verbalizes Appropriate Role Responsibility During a Code Red								
Verbalizes Appropriate Role Responsibility During a Code Blue								
C. RECEPTIONIST DUTIES:								
Identifies Self and Unit When Answering the Phone								
Utilizes Telephone Skills:								
Demonstrates mechanism to access the call pick-up function								
Demonstrates mechanism to transfer calls								
Demonstrates mechanism to place a call on hold and then resume the call								
Demonstrates mechanisms to conduct a conference call								
Verbal/Telephone Laboratory Reports:								

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Accurately Receives Lab Reports								
Accurately Documents Lab Reports								
Accurately Reports Lab Results								
Demonstrates the mechanism to access the JDH Beeper System								
Schedules Inpatient's Appointments/Procedures								
Contacts the Appropriate Department for an Inpatient to be Transported To:								
A Department that Does Not Have Transportation Services								
A Department that Does Have Transportation Services								
Arranges a Service Call on an Inpatient Unit (i.e. Call Facilities Management, Clinical Engineering, etc.).								
Identifies Location of:								
Arterial Blood Gas (ABG) kits								
24 hour Urine Containers								
All Lab Tubes and Blood Culture Bottles								
Retrieves Appropriate Lab Results from the Hospital Computer System								
Receives and Directs Visitors and Other Health Care Workers								
Delivers or Sees that Mail is Delivered to Patients and Staff								
Aware of Unit Visiting Hours								
Aware of JDH Policy Regarding Deaf and Hard of Hearing Persons – Sign Language Interpreters								
Identifies Procedure for Accessing the Language Line								
Identifies Procedure for Contacting and Utilizing General Hospital Transportation								
ADMISSION PROCEDURE:								
Admits a Patient to the Appropriate Bed Using the Bed Management System								

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Notifies the Resident of the Patient's Arrival								
Notifies the RN of the Patient's Arrival								
Assembles an Inpatient Chart, Placing the Correct Color Label on the Spine of the Chart								
Writes the Intern's Name on the Chart Label for Medical Patient's Only/the Service's Name for Non-Medical Patients								
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 Name of New Admission on Small Census Kardex								
Makes Out Clipboard for the New Patient								
Places a Stamped Flow sheet and a Patient Charge Profile Sheet on the Clipboard								
Calls Medical Records for Prior Inpatient or Ambulatory Records								
TRANSFER A PATIENT WITHIN JOHN DEMPSEY HOSPITAL:								
Transfer In:								
Transfers a Patient Into the Unit Using the Bed Management System								
Notifies Medical Resident for Medical Patients and the Resident for Other Services								
Notifies the RN of the Patient's Arrival								
Places the Correct Color Label on the Spine of the Chart								
Places Patient's Name on Midnight Census Report – under Transfer In								
Places Patient's Name on Diet Sheet								
Notifies Dietary Department of Patient Transfer In								
Makes Out Clipboard for the Transferred Patient								

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Places a Stamped Flowsheet (if applicable) and a Patient Charge Profile Sheet on the Clipboard								
Organizes and Files Paperwork from the Transferred Unit								
Transfer Out:								
Transfers a Patient Out of the Unit Using the Bed Management System								
Notifies Appropriate Personnel in Preparation for Transfer								
Copies and Collates Necessary Paperwork for a Patient Transfer								
Places Patient's Name on Midnight Census Report – under Transfer Out								
Logs Patient Out in Discharge/Log Book								
DISCHARGE A PATIENT:								
Discharge to Home:								
Discharges Patient From Unit Using the Bed Management System								
Places Patient's Name in Discharge/Log Book								
Places Inpatient Chart in Medical Records Rack								
Places Journal in the Journal File Basket								
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								
Schedules a Follow-up Appointment as Ordered, for JDH MD's Only								
Writes Follow Up Appointment on W-10/Clinical Resume								
Pulls Old Records and Places in Medical Records Basket								
Notifies ANM/Charge Nurse of Discharge								
Discharge to Another Facility/Home Care Services:								

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Calls to Arrange Transportation for Patients Discharged to Another Health Care Facility								
Copies and Collates Necessary Paperwork for a Patient to be Discharged to Another Health Care Facility								
Completes Above Discharge to Home Functions								
Discharge to the Morgue:								
Discharges Patient From Unit Using Bed Management System								
Prepares Appropriate Paperwork When a Patient Expires								
Places Patient's Name on Midnight Census Report – Under Death								
No Post Mortem: Places Chart in Medical Record's Basket								
Post Mortem: Sends Assembled Chart to Morgue								
Completes Above Discharge to Home Functions								
Gives Completed Log for Expired Patients to the Administrative Manager								
PRE-OP/POST-OPERATIVE PATIENT:								
Locates operating Room Schedule								
Places Pre-Op Checklist in the Patient Chart								
Reviews Clerk Section of Pre-Op Checklist for Any Discrepancies and Completes as Appropriate								
Writes Dietary Status on Diet Sheet								
Reorganizes Patient Chart Post-Operatively								
D. ROUTINE CLERICAL FUNCTIONS:								
Transcribes Physicians Orders onto the Nursing Kardex								
Utilizes the Addressograph Machine								
Prepares Extra Labels for PRN Lab Work								

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Places Allergy Tape Marked with Patient's Name and Allergy on the Chary, if an Allergy is Indicated									
Identifies and Fills in Clerical Section on the Following Appropriate Forms/Requisitions (when Physician Order Entry [POE] Down):									
EKG/ECHO									
Radiology									
MRI									
Cat Scan									
Nuclear Medicine									
EEG/EMG									
Blood Gas									
Holter Monitor									
Stress Test									
PFTs									
Transcribes Lab Tests onto Appropriate Lab Requisition (When POE is Down)									
Calls Consults For:									
Rehabilitation Services (Physical Therapy, Occupational Therapy, Speech Therapy)									
Dietary									
Palliative Care									
Social Services									
Case Management (Home Care – Discharge Planning)									
Chaplain									
Wound Care/Ostomy Care									
Transcribes Appropriate Information onto the Clerk's Daily Worksheet									
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Updates Lab Section on Clerk's Daily Worksheet								
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 Progress Notes When Needed								
Stocks Charts Every Shift with Order Sheets (When POE is Down)								
Reviews All Charts, Stamps Any Unstamped Documents and Repairs Loose Sheets								
Stamps and Dates Flow sheets for All Patients Every Evening								
Communicates a Unit Status Report at Change of Shift								
Orders Supplies and Forms as Needed								
Obtains Requisitions/Forms Provided by the Departments: Laboratory Requisitions, Respiratory /Pulmonary, Pathology, etc. (When POE is Down)								
Collates Admission Packs								
Obtains Copy Center Card								
Uses Copy Machine Closest to Unit								
Obtains Copy Machine Access Code for the Copy Machine in the Nursing Office								
Uses Nursing Office Copy Machine								
Prepares Paperwork for Bulk Copying								
Keeps Desk and Surrounding Area in Order								

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