

INITIAL UMG/JDH AMBULATORY COMPETENCY CHECKLIST

Position Title: Clinical Nurse

Department: Osteoporosis

Employee Name:

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	Method of Instruction (Use Instruction Key on Left)	Evaluation Summary			Evaluation Method (Use Evaluation Key on Left)	Comments
			Competent	Initials	Date		
			Yes	No			

I. ORIENTATION							
Presented at Ambulatory Services/UMG Orientation: E-mail; Internet; Kronos							
Presented at Ambulatory Services/UMG Orientation: Performance Evaluation Process							
Presented at Ambulatory Services/UMG Orientation: Electronic version of Ambulatory Service Manual & Health Administration Manual							
Locates:							
Safety Manual							
Infection Control Manual							
Decentralized Lab Manual							
Lab Procedure Manual							
Drug Sample Log Book							
UMG Practice Manual-binder and electronic version							
Understands vacation/time off request protocol for unit							
See Unit Specific Page							
II. SAFETY/INFECTION CONTROL							
Presented at Health Center Clinical Orientation							
Locates emergency equipment							
Demonstrates ability to activate codes							
Disposes of needles/sharps/catheters in designated containers per protocol							
Demonstrates appropriate use/disposal of red bag waste							
Maintains clean, organized and safe environment							
Promotes culture of safety; identifies and documents concerns							

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using safety reporting.							
Locates link to Patient Safety Net							
Participates in routine checking of emergency cart supplies and equipment, and orders replacement supplies as needed.							
Locates fire extinguishers							
Locates fire alarm pull boxes on unit							
See Unit Specific Page							
III. EQUIPMENT							
Utilizes standard unit specific technology and advance technology as appropriate.							
Operates the following equipment according to protocol:							
Computer							
Expediter Call System							
Telephone/beeper system							
Patient Lift System							
See Unit Specific Page							
IV. DOCUMENTATION/COMMUNICATION							
Presented at Ambulatory Services/UMG Orientation: Phone Etiquette							
Documents data in patient medical record per protocol							
Reviews schedules for patient appointments							
Documents triage interactions							
Documents medications, performance of procedures, patient responses, & instructions.							
Completes lab requisitions accurately and correctly							
Completes radiology requisitions accurately and correctly							

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Completes consultation forms correctly							
Reviews minutes from staff meetings							
Demonstrates ability to use electronic correspondence/forms							
Accesses patient information in LCR and EMR							
Provides factual information to patient or patient designee ensuring HIPAA compliance							
Maintains patient confidentiality and assures disposal of documentation containing patient information appropriately							
Accesses courier services as necessary							
Demonstrates ability to order necessary forms per protocol							
Attend CPT/ICD-9 coding class with documentation in patient record							
Completes e-triage messages							
Communicates/reinforces treatment plan to patient, and documents encounter in medical record.							
See Unit Specific Page							
V. PERFORMANCE IMPROVEMENT							
Participates in performance improvement activities							
Delegates responsibility to team members based on assessment of competencies							
Defines oneself as a member of the multidisciplinary team							
Shows commitment to learning new knowledge and skills to enhance service to customer/patients and achieve organizational goals							
Participates in unit based continuous quality improvement projects.							

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VI. DECENTRALIZED LAB							
See Unit Specific Page							
VII. PROVISION OF CARE							
Assessment of Patient:							
Makes critical observations and reports them accordingly to physician							
Recognizes and responds to emergency situations per protocol							
Recognizes and adapts to the individual learning needs of selected patients and families							
Planning of Patient Care:							
Develops plans of care utilizing established standards of care							
Establishes appropriate priorities in planning of patient care							
Organizes and plans assigned duties to complete tasks with appropriate timeframes							
Delivery of Patient Care:							
Successfully implements plan of care objectives							
Adapts medical techniques to the needs of the individual patient without deviating from standard technical policy							
Assures privacy and dignity of patients during care							
Evaluation of Patient Care:							
Evaluates patient's response to therapeutic intervention							
Documents patient's response in accordance with							

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applicable policies and procedures							
Communicates changes in clinical status to appropriate supervising medical staff and multidisciplinary team members within an appropriate time frame							
Collaborates with members of interdisciplinary team and community resources to effect continuity of established plan of care							
Supports research activities throughout the management of patient care							
Assists physician with procedures as needed							
Delegates responsibility to team members based on assessment of competencies							
Supervises assigned personnel to ensure appropriate implementation of care							
Functions as a clinical resource person by demonstrating proficiency in specific clinical skills							
Utilizes the UMG Case Manager in the planning and implementation of patient's plan of care as appropriate.							
Collaborates with the Diabetes Educator in the planning, delivery, and evaluation of care of diabetic patients as appropriate.							
Assist in identifying and contracting patient's appropriate for a Medication Use Agreement.							
Monitoring of patients contracted with a Medication Use Agreement.							
Patient Education and Teaching-use of available patient education tools (Carenotes, approved pamphlets and							

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brochures)							
DPH Reportable Disease Submission and Follow Up							
Use of pain scale in assessing pain							
See Unit Specific Page							
VIII. AGE SPECIFIC							
Age Specific presentation presented at Health Center Clinical Orientation							
Appropriately evaluates patient, family and staff educational needs							
Communicates information to patients and family in language that is clearly understood.							
Identifies age specific education needs based on diverse patient and family population.							
Seeks and distributes appropriate education materials.							
See Unit Specific Page							
IX. CUSTOMER SERVICE							
Presented at Ambulatory Services/UMG Orientation: Customer Service Skills							
Committed to determining and exceeding patient/customer needs and promotes area service standards							
Takes responsibility for job by reporting to work on time and considering the needs of the unit when requesting time off							
Recognizes how actions will affect others and uses problem solving skills and creativity to address identified opportunities							
X. CLERICAL SKILLS							
Presented at Ambulatory Services/UMG orientation: Patient							

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flow describing duties of Clerk, COA, PSR, Provider							
Utilizes telephone/beeper system per protocol							
Prepares vouchers according to protocol							
Demonstrates the process of disposing printed materials which contain patient information							
Identifies the number for IT call center (x4400)							
XI. FISCAL RESPONSIBILITY							
Complies with policies regarding patient charges, supplies, etc.							
Participates in activities aimed at evaluating and improving fiscal outcomes of care							
Billing voucher completion following nursing encounter							
Utilizes assigned case numbers for patient visits associated with research studies, motor vehicle accidents and workers compensation.							
Completes ABN validation for Medicare Part A&B patients							
Use of proper CPT and ICD9 codes when submitting requisitions and vouchers.							
See Unit Specific Page							
XII. IDX SCHEDULING & REGISTRATION SYSTEM AND CLINICAL INFORMATION SYSTEMS							
Presented at Ambulatory Services/UMG Orientation: Access to IDX							
Presented at Ambulatory Services/UMG Orientation: Access to LCR Systems, Caremedic, EMR							
Presented at Clinical Systems Training Part 1: IDX Scheduling							

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System:							
Demonstrates ability to locate patient in database							
Demonstrates knowledge of basic selections of ADT, BAR							
Performed mini- registration of new patient							
Performed scheduling & canceling of appointment							
Performed linking of appointment for deaf interpreter							
Presented at Ambulatory Services/UMG Orientation: LCR System							
See Unit Specific Page							
XIII. EDUCATION							
Presented at Ambulatory Services/UMG Orientation: Ability to access HealthStream Education System							
Completes required yearly education courses as noted in HealthStream system							
Safety							
IC							
CPR							
Code Blue							
Laboratory							
Age Specific							
Unit Specific							
Corporate Compliance							
HIPAA							
Attends job related in-services throughout the year							
CEUs for certification							
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UNIT SPECIFIC CHECKLIST:							
III. EQUIPMENT							
Electronic scale							
EKG machine							
Stadiometer							
Glucometer							
Digital sphygmomanometer							
Digital thermometer							
VI. DECENTRALIZED LAB							
Fingerstick blood sugar testing							
VII. PROVISION OF CARE							
Cortrosyn stimulation testing							
Zometa patient care management							
Vaccine administration							
Pamidronate patient care management							
Testosterone injections							
Forteo patient teaching-self injection, device teaching, medication teaching							
Boniva administration-IV push, patient teaching, laboratory test monitoring							
Bone density requisition completion							
O2 administration							
Phlebotomy							
IV insertion							
IV fluid administration							
Complies with approved policy and procedure for Infusion							

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Therapy performed in the Osteoporosis Practice Site.							
VIII. AGE SPECIFIC							
Knowledge of geriatric community resources							
Integrates geriatric community resources into coordination of care activities.							
XII. IDX SCHEDULING & REGISTRATION SYSTEM and Clinical Information Systems							
Labcalls							

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