EL RIO HEALTH

SCOPE:

This procedure applies to CLINICAL and NON-CLINICAL departments in the following El Rio Health functional areas and/or locations (check all that apply):

☒ **Family Medicine**	☒ **Same Day Appt. Clinic**	☐ **Radiology**	☐ **MOR/DOS**
☒ **Internal Medicine**	☒ **HOB/HOU**	☐ **Pharmacy**	☐ **Administration**
☐ **Pediatrics**	☒ **SIA**	☐ **Laboratory**	☐ **Human Resources**
☐ **Dental**	☐ **Care Coordination**	☐ **HIM**	☐ **Accounting**
☐ **Behavioral Health**	☐ **Wellness**	☐ **Information Technology**	☐ **Business Office**
☒ **Midwives**	☒ **Clinical Pharmacy**	☐ **Patient Communications**	☐ **Coding**
☒ **OB/GYN**	☐ **Facilities**	☐ **Advocacy & Eligibility**	☐ **Security**
	☐ **Purchasing**	☐ **Physical Therapy**	☐ **Transportation**

PROCEDURE DESCRIPTION: Patient Care Checklist - Adult Care	**PAGE:** 1 of 4
	REFERENCE NUMBER: NUR-003-SOP-CKL-001
APPROVAL DATE: 12/2022	**DATES REVIEWED WITHOUT CHANGE:** 12/2019:07/2020:06/2022
EFFECTIVE DATE: 12/2022	**REPLACES POLICY DATED:**
NEXT REVIEW DATE: 12/2024	**DATE RETIRED:** N/A
RESPONSIBILITY: Regional Health Center Directors Adult Medical Directors	**APPROVALS:** PPC: 12/2022 CAC: 12/2022

PURPOSE: To provide the medical assistants and licensed nursing staff with a procedure for performing workflow tasks during the medical office visit.

PROCEDURE:

MA Checklist (Adult)

Pre-Rooming

      Review patient care gaps (Mammo/Colonoscopy/Ophthalmology etc.)
      Reconcile outside vaccines

AIDET *Greet patient and introduce self*

      Log into the Appropriate Department
      Select Provider Schedule OR Resource

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Perform Self Check

- ✓ Verify you are in the Correct Department
- ✓ Verify you are the person logged in
- ✓ Verify you are in the correct Schedule or Resource
- ✓ Verify in the schedule you are selecting the correct Patient chart then change the schedule to "rooming in progress"
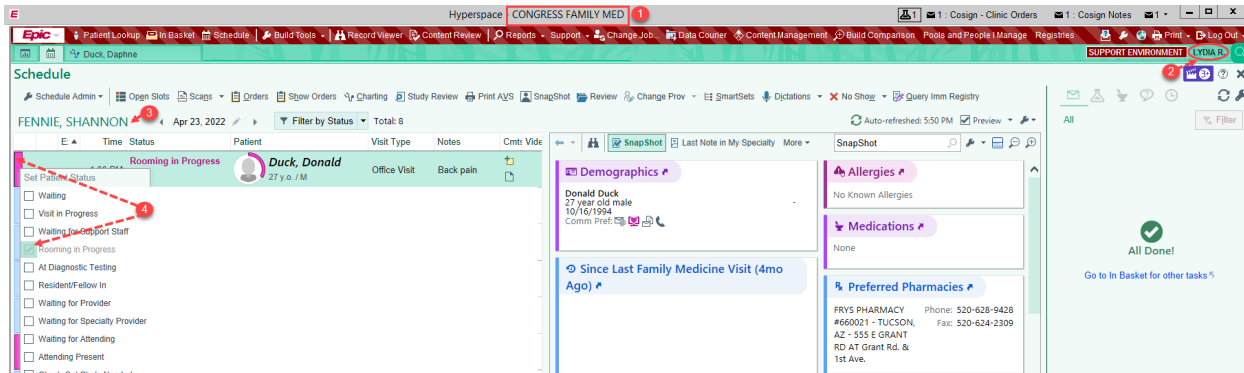
Rooming

      Document reason for visit

      Document vital signs (Always recheck and document if initial BP is >140/90)

      Measure patient's height (once yearly)

      Measure the patient's and weight (every visit)

    Escort patient to room (for diabetic patients remove patient's shoes)

      Review / update patient allergies (Mark as reviewed)

      Verify patient's pharmacy (update as needed)

          o Update patient's current medications (Taking/not taking)

          o Reconcile outside medication information (Mark as reviewed)

      Review and update patient's medical and surgical history (Mark as reviewed)

          o Document a patient's family health history

☐ Health Literacy Screening

☐ Self-Management Goals

      Tobacco Use (yearly)

      Alcohol (Update Status and then fill out Audit C/ Mark as reviewed)

      Enroll/educate patient in MyChart

      Click on "Go to Screenings" link

          o Depression screening with PHQ (yearly)

          o Intimate partner violence (yearly)

          o Screen for fall risk for 65+ (yearly)

          o Screen for reproductive health as appropriate (each visit)

      Collect Advanced Care Planning; provide advance directive education to patient by clicking on the picture on the Storyboard. Collect (yearly)

          o Click on Demographics tab

          o **NOTE:** If patient does not have one, give one, and document the following under Type of

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Document:
- ▪ Type of Document (i.e., Advanced Directives)
- ▪ Description (Free type form given to patient)
- ▪ Status (Accepted)
- o **MUST click MARK AS REVIEWED**

Open "code status" link on story board and update name and contact number for patient's "Health Care Agent"

ACP- should be completed via MyChart and will populate in the area under Advance Care Planning/Patient Entered Wishes

Change schedule status to "waiting for provider"

Wrap Up Visit

Close care gaps using standing orders:

Vaccinations

TB Tests

Diagnostic swabs

Mammogram (ages 50-70)

Colorectal screening (ages 45-70)

Diabetic finger stick blood glucose only if requested by provider or patient

Diabetic retinopathy screening either obtain last ophthalmology note if had done within past 12 months OR facilitate retinal camera today

Complete any in-clinic medication administration or procedures/treatments. Enter/Edit results diagnostics or MAR

Complete any POCT ordered tests

Print lab orders per patient's request.

Print x-ray requisition per patient's request

Print copy of any referrals and give to patient

Provide patient education and send using Patient Pass (Elsevier)

Customize patient instructions

Review plan with patient and advise patient AVS document available on MyChart; if patient not on MyChart print After Visit Summary and provide to patient

AIDET *Thank the patient for coming today.*

"We hope your visit today was excellent". "We want our service to you to be excellent."

This Form can be found for individual printout and use on SharePoint→Forms→Clinical Folder→MA Checklist

https://elrio.sharepoint.com/Forms/Forms/AllItems.aspx?id=%2FForms%2FClinical

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REFERENCES:

NUR-024-SOP-SO-003a-h Standing Orders for Flu Vaccines
NUR 024 SOP-SO-017 Standing Order for Tdap Vaccination for Adult Patients
NUR 024 SOP-SO-006 Diabetic Fingerstick Blood Glucose Testing
NUR-024-SOP-SO-015 Breast Cancer Screening
NUR 024 SOP-SO-016 Colorectal Screening
NUR-024-SOP-SO-043 Standing Orders for Administration of Prevnar 20 (PCV20) to adults 65 years and Older
COP 060-SOP-001 Standing Order and Procedure for Diabetic Retinopathy Screening with COVID Recommendations

Version 5/2022