afc

american family care®
URGENT CARE

Name

OUR CORE PURPOSE

We value each individual and commit to improve every life we touch with dignity, care, and compassion.

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Working Hours, PTO, and Vacation:

Vacation and Time Off: Requests must be submitted 30 days prior to the dates requested and no sooner than 60 days prior.

Vacation requests are not guaranteed and will be approved on a first come first serve basis.

Requests can be honored by seniority, the time of request or clinic demands; not necessarily in that order.

Calling out: Must be done via phone call at least two hours prior to your shift. **This cannot be done via Text Message and you get 5 call outs a year.**

Paid Holidays: We are closed Thanksgiving Day, Christmas Day and New Years Day.

You are eligible for holiday pay if you: Have passed your 90 days, currently scheduled to work that day, and have worked your scheduled day before and after said holiday

Employee Resignation and Policy:

If you decide to part ways with AFC, PTO will be paid out if you provide 3 weeks notice.

Less than two weeks notice will impact your eligibility to be rehired.

Quarterly Events:

We host **mandatory** quarterly meetings. Held around the second week of Jan, April, Jul, Oct. Mark your calendars!

We announce employee of the quarter, raffle prizes and bonus payouts!

Benefits and Perks:

There are employee **AND** family discounts if you are seen at AFC. *Please reach out to managers and our internal billing department for details.*

There is a yearly $55 uniform allotment that resets every July.

Reimbursement for CEU credits are available after one year. *See manager for details.*

There are bonuses if you refer someone to work at AFC and they successfully pass their 90 day probationary period.

Quarterly employee bonuses based on EBITDA are paid out approximately on the following dates: Feb 5, May 5, Aug 5 and Nov 5.

Employees who have finished 1,000 hours of work in a 12 month period are automatically enrolled in 401k after a year of employment. There is a 3% company contribution.

Free Employee Assistance program Call (866) 750-1327

Services include:
24 hour crisis help
Counseling help
Mediation assistance
Financial consultation
Adult and elder care assistance
Home ownership assistance
Child care resources

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Where to go for Common Questions

Clinic Related Questions:

Inventory for the clinic	Ask Lead, Clinic, Coordinator, then Clinic Manager in that order
Registering	
Triaging	
Lab/DS/BAT questions	Ask Lab Assistant, then Lab Manager

Patient-related questions:

Workers comp (Attorneys, Claim denial, mail):	Email workerscomp@afcurgentcareportland.com
Referral questions:	Email referrals@afcurgentcareportland.com
Prior authorization requests:	Work with your lead/clinic coordinator Email careteam@afcurgentcareportland.com
Billing questions:	Email billing@afcurgentcareportland.com
X-RAY questions/concerns:	Check with Xray Tech Onsite, if not available then reach out to the Xray Manager
Refill requests:	Urgent Care: No refills - need a follow-up Primary Care: Ask the provider on staff, if they don't feel comfortable then ask the provider that prescribed it, they may need a follow up.

Internal questions:

HR questions (timecards, time off requests):	Clinic Manager
HR questions (policies, violations, concerns, etc.)	Talk to the Clinic Manager, Operations Manager or email hr@afcurgentcareportland.com
Docutap concerns:	Check with the lead/clinic coordinator then call Docutap customer service phone (866) 995-9863
IT issues:	Send a "Complete Request" email to IT@afcurgentcareportland.com
Website logins:	Reach out to Clinic Manager

Self-Serve Human Resources (HR) Model

AFC Portland utilizes a self-service HR Model. This means you have direct access to benefit resources at our company vendors. Please take advantage of this access by directly contacting the vendors below if you need help or have questions.

Benefits Advocate

Benefits Advocate Center
Medical (Regence); Dental, Vision, Life Insurances (Guardian)
Gallagher Benefit Service
ph. (833) 850-2182 (TX)
bac.eagletonhealthcareincadvocates@ajg.com

COBRA & HSA/FSA Participation Services

Proficient Benefit Solutions
Billie Harber
ph. (210) 384-2325 (TX)
bharber@proficientbenefits.com

401k

Administered by ADP, plan #286293
Client Support
ph. (800) 929-2710
adp.401k.client.services.express@adp.com

Advisors/Support with Phillips & Company
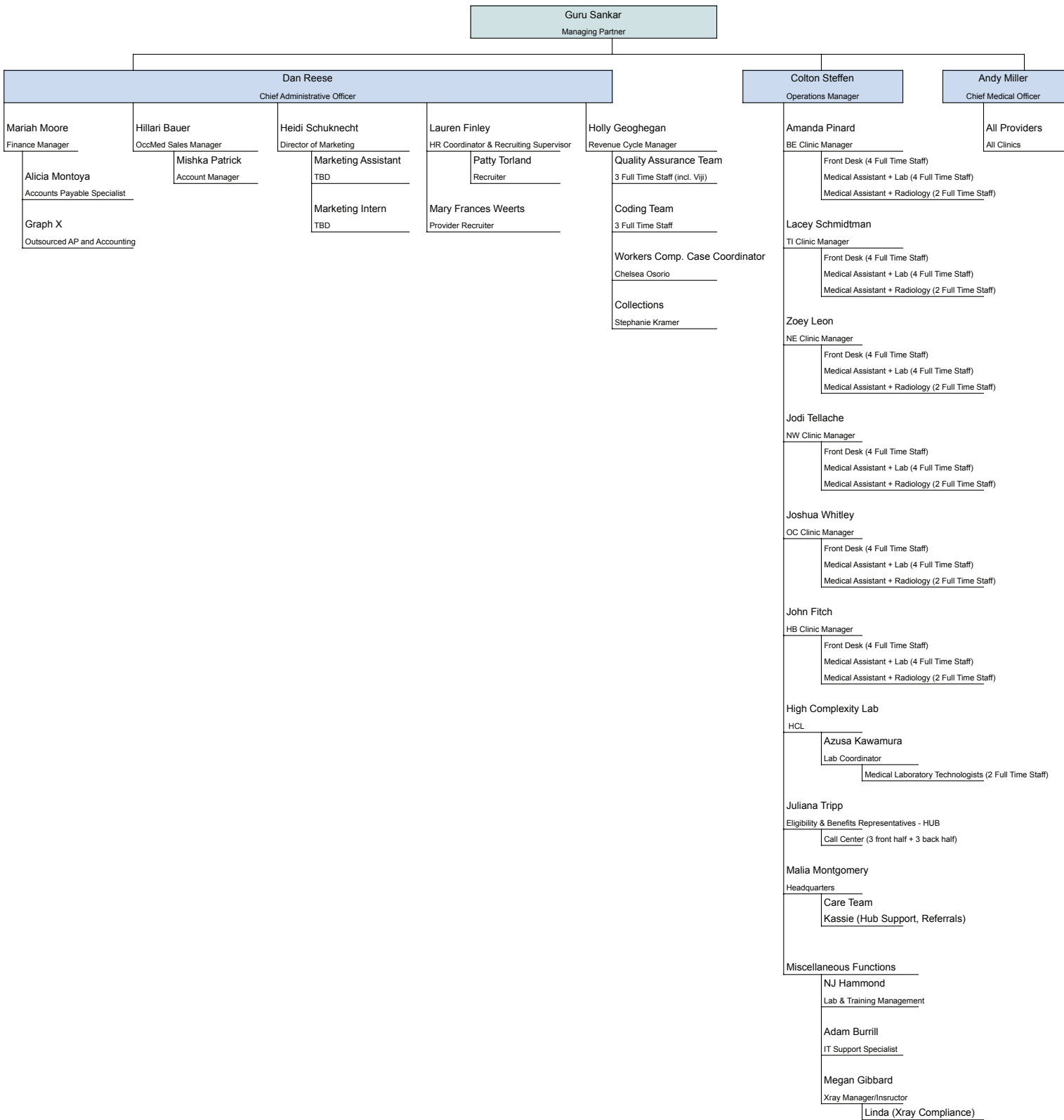**Steve Thomas** - Sr. Investment Advisor
ph. (503) 416-4680
sthomas@phillipsandco.com

AFC Google Drive

Use as a resource for information, forms, and support

AFC Portland Organization Chart

Guru Sankar
Managing Partner

Dan Reese — Chief Administrative Officer

Colton Steffen — Operations Manager

Andy Miller — Chief Medical Officer

Dan Reese — Chief Administrative Officer

Mariah Moore
Finance Manager
- **Alicia Montoya** — Accounts Payable Specialist
- **Graph X** — Outsourced AP and Accounting

Hillari Bauer
OccMed Sales Manager
- **Mishka Patrick** — Account Manager

Heidi Schuknecht
Director of Marketing
- **Marketing Assistant** — TBD
- **Marketing Intern** — TBD

Lauren Finley
HR Coordinator & Recruiting Supervisor
- **Patty Torland** — Recruiter
- **Mary Frances Weerts** — Provider Recruiter

Holly Geoghegan
Revenue Cycle Manager
- **Quality Assurance Team** — 3 Full Time Staff (incl. Viji)
- **Coding Team** — 3 Full Time Staff
- **Workers Comp. Case Coordinator** — Chelsea Osorio
- **Collections** — Stephanie Kramer

Colton Steffen — Operations Manager

Amanda Pinard
BE Clinic Manager
- Front Desk (4 Full Time Staff)
- Medical Assistant + Lab (4 Full Time Staff)
- Medical Assistant + Radiology (2 Full Time Staff)

Lacey Schmidtman
TI Clinic Manager
- Front Desk (4 Full Time Staff)
- Medical Assistant + Lab (4 Full Time Staff)
- Medical Assistant + Radiology (2 Full Time Staff)

Zoey Leon
NE Clinic Manager
- Front Desk (4 Full Time Staff)
- Medical Assistant + Lab (4 Full Time Staff)
- Medical Assistant + Radiology (2 Full Time Staff)

Jodi Tellache
NW Clinic Manager
- Front Desk (4 Full Time Staff)
- Medical Assistant + Lab (4 Full Time Staff)
- Medical Assistant + Radiology (2 Full Time Staff)

Joshua Whitley
OC Clinic Manager
- Front Desk (4 Full Time Staff)
- Medical Assistant + Lab (4 Full Time Staff)
- Medical Assistant + Radiology (2 Full Time Staff)

John Fitch
HB Clinic Manager
- Front Desk (4 Full Time Staff)
- Medical Assistant + Lab (4 Full Time Staff)
- Medical Assistant + Radiology (2 Full Time Staff)

High Complexity Lab
HCL
- **Azusa Kawamura** — Lab Coordinator
  - Medical Laboratory Technologists (2 Full Time Staff)

Juliana Tripp
Eligibility & Benefits Representatives - HUB
- Call Center (3 front half + 3 back half)

Malia Montgomery
Headquarters
- Care Team
- Kassie (Hub Support, Referrals)

Miscellaneous Functions
- **NJ Hammond** — Lab & Training Management
- **Adam Burrill** — IT Support Specialist
- **Megan Gibbard** — Xray Manager/Insructor
  - Linda (Xray Compliance)

Andy Miller — Chief Medical Officer

All Providers — All Clinics

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Here are important details about your first 90 days:

Please read thoroughly, placing a checkmark in each box showing that you acknowledge each item.

The AFC Culture:

☐ The AFC Team is excited to have you onboard and wants you to succeed! We highly encourage new team members to ask questions throughout the onboarding and training process.

☐ AFC is a retail model business. This means you will be asked to make patient calls, discuss services with patients, and participate in business initiatives as needed.

☐ After 90 days, branded scrubs will be supplied and must be worn at all times.

☐ Our customer service modules are considered essential training. All staff is expected to follow our customer service guidelines at all times.

☐ Be responsive to AFC emails and IMs in a timely manner.

☐ 1:1's playing a key role in our communication. Be engaged in these meetings, provide feedback, and ask questions.

Benefits:

☐ PTO is available after 90 days.

☐ Other benefits, such as health insurance, are available for those eligible on the first of the month following 30 days.

☐ Bonus Eligibility is prorated depending on date of hire. Details are in your offer letter. Please discuss with your manager for details.

☐ AFC has a "self-service" benefits model, please refer to the "Self-Serve Human Resources (HR) Model" page in this booklet or the ADP homepage for contact information and helpful links.

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Attendance:

☐ Callout policy, call and speak with a manager at least 2 hours before the start of your shift - only calls are accepted (no text or email).

☐ Shift starts 15 minutes before the clinic opens. You are allowed to clock in up to 30 minutes before.

☐ Oregon law requires a 30-minute lunch for shifts scheduled for 6 hours or more. It is your responsibility to take your 30 min lunch break.

☐ New employees are excused from on-call for the first 60 days, after which you will need to sign up for an on-call shift by the 25th of the previous month.

　☐ If you do not sign up for a shift, you will be assigned one.

　☐ If you can't work an on-call shift you are signed up for, you must find coverage for it.

　☐ Your on-call shift may be at any of the AFC's clinics

Training:

☐ Your training passport must be turned in & completed before you are eligible for your 90-day performance review.

☐ You are responsible for your training. You will work with a mentor and teammates in the clinic. You will need to ask questions and have them sign off on your mandatory 90-day passport.

☐ Pay close attention to your AFC email and put deadlines on your calendar. You will be given assignments from the Lab & Training Manager, and you must complete them by your assigned deadlines.

☐ **If it isn't documented, it didn't happen: Please document all patient interactions in the PM/EMR Notes immediately after the interaction.**

_____
Employee Printed Name

_____　_____
Employee Signature　　　　　　　　　　　　　　　　　　　　　　　Date

All Staff

Skill/ Knowledge Area	Task	Training Vehicles	Tests/Measurement	Sign-Off/Date
Organizational History/Culture	Received & Read Employee Handbook	- ADP	- Passport signed by HR	
	Received & Read HIPAA Privacy Policy & Procedure Manual	- ADP	- Passport signed by HR	
	Attend New Hire Orientation	- In Class	- Passport signed by Orientation sponsor/manager	
Customer Service	Attend New Hire Orientation	- In Class	- Passport signed Orientation sponsor/manager	
Policies/Compliance	Review AFC Policies	- In Class/ Binder - Handouts	- Passport signed by Orientation sponsor/manager	
	Passes HIPAA Tests	- MedTrainer - Handouts	- Passport signed Orientation sponsor/manager	
	Passes BBP Tests	- MedTrainer - Handouts	- Passport signed by Orientation sponsor/manager	
Systems/ Tools	ADP	- Binder - On the Job	- Observation and Feedback - Passport signed by Clinic Manager	
	Google Suite	- In Class/ Binder - Google Videos - On the Job	- Observation and Feedback - Passport signed by Clinic Manager	
	Smart Dollar	- On the Job	- Observation and Feedback - Passport signed by Clinic Manager	

Front Desk

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Skill/ Knowledge Area	Task	Tests/Measurement	Sign-Off/Date	
Front Desk Etiquette	Front Desk Staff Orientation	- Passport Signed		- Can they tell you the 10-4 rule? - Do they follow the 10-4 rule?
Front Desk Tools	Uses SFax to send and received faxes	- Observation & Feedback - Passport signed by Trainer		- Can they send and receive faxes through SFax? - Do they know which categories to file them under and how? - Do they know when and how to forward faxed to other clinics? - Do they know what do when they receive a PA (Prior Authorization) through SFax? - Do they know what do when they receive a refill requests we receive through SFax? - Do they know what do when they receive records request through SFax? - Do they know what do when they receive patient records through SFax?
	Uses Clockwise to register patients & set appointments	- Observation & Feedback - Passport signed by Trainer		- Can they schedule future patient's on clockwise? - Do they know how to change an appointment? - Do they know how to figure out what provider is working the day of the requested appt?
	Uses RAYUS (Formerly EPIC Imaging) to send referral and pull imaging	- Observation & Feedback - Passport signed by Trainer		- Do they know their login for Epic? Have they added it to your password spreadsheet? - Do they know how to submit a regular and STAT referral? - Each morning do they log in and print out any new results?
	Uses CerteDrive	- Observation & Feedback - Passport signed by Trainer		- Do they know their log in for CerteDrive? Have they added it to your password spreadsheet? - Do they know how to register a new patient in CerteDrive? - Do they know how to register an existing patient in CerteDrive? - Do they know the difference between Intrastate and Interstate? - Do they know how to differentiate between a CDL (Commercial Driver's License) and a regular Driver's License? - Do they know the difference between Determination pending and Incomplete examination.
Opening/ Closing Procedures	Completes Opening/ Closing Procedures	- Observation & Feedback - Passport signed by Trainer		- Do they know how to use their badge to unlock the doors and disarm the security system in the morning? - Do they know where to find the Opening/Closing checklists for the front desk? - Do they know how to get the cash for the till from the safe? - Do they know where to find the remotes/keyboards for the TV and Monitor in the lobby? - Do they know how to review the schedule and make appropriate changes and calls to prevent a "bottle neck"? - Do they know how to contact & remind PCP patients of their appointments on the following day? - Do they know where the scanning bin and provider outbox is located? - Do they know how to check voicemails and return patient calls? - Do they know how to run the patient payments report? - Do they know where to find the Payment Reconciliation sheet in the google drive? - Do they know how to print the reconciliation and report and drop it in the dropbox? - Do they know how to review Sx's & Q's for the day? - Do they know how to create and fill out the Daily email? - Do they know how to fill out the Daily spreadsheet? - Do they know how to fill out the daily visit count on the bonus tracking sheet? - Do they know how to lock the doors at the end of the day?
Greeting patients & Telephone Etiquette	Properly greets Patients	- Observation & Feedback - Passport signed by Trainer		- Do they answer per protocol? - Do they put Pt's on hold per protocol? (Place in line, wait for response)
	Uses proper telephone etiquette	- Observation & Feedback - Passport signed by Trainer		- Do they know where the extension list is for all the staff and providers? - Do they know how to make a telephone encounter for the providers?
Registering Self Pay Patient	Registers Self Pay Patient	- Observation & Feedback - Passport signed by Trainer		- Do they know how to register a Self Pay Patient? - Do they know where to find the Self Pay Fee Sheet's? - Do they know the Self-Pay Office Price?
	Collecting Self Pay payments	- Observation & Feedback - Passport signed by Trainer		- Do they know how to compare the payment screen to the Self Pay sheet for accuracy? - Do they know if they need a card on file for Self pay patients?
Registering Insurance Patient	Registers Insurance Patient	- Observation & Feedback - Passport signed by Trainer		- Do they know where to find the accepted insurance list in your clinic & in the Drive? - Do they know where to enter a patient's insurance information? - Do they know what to do if the insurance information is not in the system?
	Verifying Insurance	- Observation & Feedback - Passport signed by Trainer		- Do they know how to verify insurance using DocuTap RTE system? - Do they know when to check other verification systems/call insurance companies for verification? - Do they know how to call insurance companies for verification? - Do they know their log in for MMIS? Have they added it to your password spreadsheet? - Do they know how to use MMIS? - Do they know their log in for CIM3? Have they added it to your password spreadsheet? - Do they know how to use CIM3? - Do they know their log in for OneHealthPort? Have they added it to your password spreadsheet? - Do they know how to use OneHealthPort?
	Collecting Co-Pay/ Co-Insurance	- Observation & Feedback - Passport signed by Trainer		- Do they know what a deductible is? - Do they know when we collect Copay and/ or Coinsurance? - Do they know how to determine if a Deductible is un-met? - Do they know how to determine if a Deductible does not apply to a visit type? - Do they know when to collect $150? - Do they know the difference between the two? - Do they know the percentages for Coinsurance collection?
	Collect Card of File	- Observation & Feedback - Passport signed by Trainer		- Do they know when to collect a CCOF (Credit Card On File) and when not to? - Do they know where the CCOF form is located in your clinic & the Drive? - Do they know how to save a CCOF?
	Adding a Guarantor	- Observation & Feedback - Passport signed by Trainer		- Do they know when they need to enter a Guarantor? - Do they know where the Guarantor needs to be written on the registration form? - Do they know how to enter a Guarantor?

OCC MED Patients	Registers OCC MED Patient	- Observation & Feedback - Passport signed by Trainer		- Do they know how where the Occ Med Registration forms are in your clinic? - Do they know how where the ROI (Release Of Information) forms are in your clinic? - Do they know how to read a PO (Purchase Order)/ Authorization form? - Do they know how how to add an employer into a patient's demographics? - Do they know how what to do if an employer is not in our EMR?
	Printing Protocol per company	- Observation & Feedback - Passport signed by Trainer		- Do they know where to find Occ Med protocols? - Do they know how to print the protocols per the PO/Authorization form?
	Knows what paperwork is needed for OCC MED	- Observation & Feedback - Passport signed by Trainer		- Do they know where to find the AFC standard Occ Med Forms? - Do they know where to find client specific Occ Med Forms? - Do they know what parts of the standard Occ Med forms need to be filled out by the patient? - Do they know what a CCF is? - Do they know where to find the CCF ? - Do they know what parts of the CCF to complete in Step 1?
	Set up OCC MED for clinical staff	- Observation & Feedback - Passport signed by Trainer		- Do they know how to prepare the Occ Med paperwork on the clipboard to be given to the MA staff? - Do they know why the order of paperwork on the clipboard is important?
	Sends OCC MED paperwork to Client	- Observation & Feedback - Passport signed by Trainer		- Do they know how to read the protocol instructions on how to send the Occ Med paperwork? - Do they know how to email Occ Med paperwork to an employer? - Do they know how to fax Occ Med paperwork to an employer? - Do they know how to send Occ Med paperwork through the Employer Portal in the EMR? - Do they know how to note the account when paperwork is sent to an employer? - Do they know how to properly scan Occ Med paperwork into the patient chart?
Registering Pre-Op Patient	Registers Pre-Op Patient	- Observation & Feedback - Passport signed by Trainer		- Do they know what a Pre-Op is? - Do they know where to find the Pre-Op Forms? - Do they know what parts of the Pre-Op forms need to be filled out by the patient?
	Sends Pre-OP Paperwork to Client	- Observation & Feedback - Passport signed by Trainer		- Do they know what Pre-Op paperwork needs to be sent? - Do they know how to send the Pre-Op paperwork?
Registering Quick Visit	Registers Quick Visit	- Observation & Feedback - Passport signed by Trainer		- Do they know what all the quick visits are? - Do they know what where the PPD/TB/QFT forms are in your clinic? - Do they know what parts of the PPD/TB/QFT forms are to be complete by the patient? - Do they know what to do is the Pt wants to bill their TB skin test to insurance?
	Collecting Quick Visit payments	- Observation & Feedback - Passport signed by Trainer		- Do they where to find the prices of the Quick Visit services?
Registering Sports Physical Patient	Registers Sports Physical Patient	- Observation & Feedback - Passport signed by Trainer		- Do they know what if the Pt comes in for a Sports physical and has Care Oregon Insurance?
	Sports Physical Paperwork	- Observation & Feedback - Passport signed by Trainer		- Do they know where the Sport's Physical form is located in your clinic? - Do they know which parts of the Sport's Physical form is to be completed by the patient?
USCIS Patients	Registers USCIS Patient	- Observation & Feedback - Passport signed by Trainer		- Do they know what is a USCIS patient? - Do they know how to register 1st visit? - Do they know how to register 2nd visits? - Do they know what paperwork to give the Patient to complete? - Do they know what paperwork to get from the Patient?
	USCIS Paperwork	- Observation & Feedback - Passport signed by Trainer		- Do they know how to use MedFiller? - Do they know when the patient should sign and date the I-93 form? - Do they know when the provider should sign the I 693 form?
	Collecting USCIS payments	- Observation & Feedback - Passport signed by Trainer		- Do they know how much to collect for 1st Visit? - Do they know when not to collect payment for 1st Visit? - Do they know how much to collect for 2nd Visit? - Do they know how much to collect for a chest X ray? - Do they know how much to collect for vaccinations/Titers and how to bill?
	Completes USCIS Paperwork	- Observation & Feedback - Passport signed by Trainer		- Is I-693 verified for accuracy? - Is all supporting documentation verified? - Is all paperwork scanned into the Pt chart? - Is a copy of all paperwork going into the packet given to the Pt? - Is the properly sealed envelope given to the Pt?
WC Patients	Registers Work Comp Patient	- Observation & Feedback - Passport signed by Trainer		- Do they know what forms are needed for a first visit? - Do they know what forms are needed every follow up visit & closing visit? - Do they know what parts of the 827 the Pt needs to fill out? - Do they know how to find the company's insurance carrier? - Do they know how to see if company already has an account with our office?
	Work Comp paperwork	- Observation & Feedback - Passport signed by Trainer		- Do they know what paperwork is needed when patient checks out? - Do they know what paperwork needs to go to WC? - Do they know what paperwork needs to go to the employer? - Do they know when the 827 & supporting docs needs to be sent out by? - Do they know how to send out the WC paperwork to the WC insurance? - Do they know when the 3245 needs to be sent out by? - Do they know how to send out the 3245 to the employer?
Patient Portal	Knows how to send Records & Reset Password	- Observation & Feedback - Passport signed by Trainer		- Do they know how to send records via patient portal? - Do they know how to reset the Pt password?
Scanning and labeling correctly	Scans Patient documents into Patient charts and labels per protocol	- Observation & Feedback - Passport signed by Trainer		- Do they know what paperwork should be scanned and labeled? - Are they labeling the paperwork per protocol?
Pending Patient Paperwork	Files pending patient paperwork correctly	- Observation & Feedback - Passport signed by Trainer		- Do they know where to put pending paperwork in the clinic? - Do they know how often to check the pending folders for old paperwork?
Location of Original Forms	Can find needed forms	- Observation & Feedback - Passport signed by Trainer		- Do they know where to find ALL master forms?

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Skill/ Knowledge Area	Task	Tests/Measurement	Sign-Off/Date	
Vitals	Manually collects BP, Pulse, Respiration Using vitals machine collects BP, Pulse, Temperature and O2 on all Patients Pain scale for all Patients	- Observation & Feedback - Passport signed by Trainer		- Is manual BP taken using proper technique? - Is automatic BP taken using proper technique? - Is BP documented in EMR per protocol? - Is manual pulse taken using proper technique? - Is automatic pulse taken using proper technique? - Is pulse documented in EMR per protocol? - Is respiration taken taken using proper technique? - Is respiration documented in EMR per protocol? - Is temperature taken using proper technique? - Is temperature documented in EMR per protocol? - Is O2 taken using proper technique? - Is O2 documented in EMR per protocol? - Is Pain scale documented in EMR per protocol?
	Collects Height and Weight on all Patients	- Observation & Feedback - Passport signed by Trainer		- Is height collected per protocol (not asking Pt)? - Is height documented in EMR per protocol? - Is weight collected per protocol (not asking Pt)? - Is weight documented in EMR per protocol?
	Room Urgent Care Patient	- Observation & Feedback - Passport signed by Trainer		- Is the Pt moved to the Provider schedule in the EMR? - Is the Pt added to the Chart Room & turned Yellow for Nurse in the EMR? - Introducing self with name and credentials every time? - Is Screening Questions asked and completed per protocol in EMR? - Is Chief Complaint documented per protocol in the EMR (including PQRST)? - Is Med list documented per protocol in the EMR (including dosages & Pharmacy)? - Is past Med list reviewed with Pt for accuracy & updated per protocol in the EMR? - Is PMH documented per protocol in the EMR? - Is past PMH list reviewed with Pt for accuracy & updated per protocol in the EMR? - Is Surgical Hx documented per protocol in the EMR? - Is past Surgical Hx list reviewed with Pt for accuracy & updated per protocol in the EMR? - Is Allergies documented per protocol in the EMR? - Is past Allergies list reviewed with Pt for accuracy & updated per protocol in the EMR? - Is Family Hx documented per protocol in the EMR? - Is Social Hx documented per protocol in the EMR (Tobacco, Drug, Alcohol)? - Is Pt prepped for a procedure if needed (ie wound clean, in a gown, standing orders)? - Are wait times & status communicated w/ the Pt? - Is the Chart Room turned to Blue for Provider in the EMR?
	Room MVA	- Observation & Feedback - Passport signed by Trainer		- Is the Pt moved to the Provider schedule in the EMR? - Is the Pt added to the Chart Room & turned Yellow for Nurse in the EMR? - Introduction with name and credentials every time? - Is Screening Questions asked and completed per protocol in EMR? - Is Chief Complaint documented per protocol in the EMR (including PQRST)? - Is Med list documented per protocol in the EMR (including dosages & Pharmacy)? - Is past Med list reviewed with Pt for accuracy & updated per protocol in the EMR? - Is PMH documented per protocol in the EMR? - Is past PMH list reviewed with Pt for accuracy & updated per protocol in the EMR? - Is Surgical Hx documented per protocol in the EMR? - Is past Surgical Hx list reviewed with Pt for accuracy & updated per protocol in the EMR? - Is Allergies documented per protocol in the EMR? - Is past Allergies list reviewed with Pt for accuracy & updated per protocol in the EMR? - Is Family Hx documented per protocol in the EMR? - Is Social Hx documented per protocol in the EMR (Tobacco, Drug, Alcohol)? - Is Pt prepped for a procedure if needed (ie wound clean, in a gown, standing orders)? - Are wait times & status communicated w/ the Pt? - Is the Chart Room turned to Blue for Provider in the EMR?
	Room Pre-Op	- Observation & Feedback - Passport signed by Trainer		- Is Pre-Op Order reviewed before rooming Pt? - Is Pre-Op paperwork reviewed & verified that have the correct forms? - Is Pre-Op Questionnaire reviewed for completeness? - Is the Pt moved to the Provider schedule in the EMR? - Is the Pt added to the Chart Room & turned Yellow for Nurse in the EMR? - Introduction with name and credentials every time? - Is Screening Questions asked and completed per protocol in EMR? - Is Chief Complaint documented per protocol in the EMR (including PQRST)? - Is Med list documented per protocol in the EMR (including dosages & Pharmacy)? - Is past Med list reviewed with Pt for accuracy & updated per protocol in the EMR? - Is PMH documented per protocol in the EMR? - Is past PMH list reviewed with Pt for accuracy & updated per protocol in the EMR? - Is Surgical Hx documented per protocol in the EMR? - Is past Surgical Hx list reviewed with Pt for accuracy & updated per protocol in the EMR? - Is Allergies documented per protocol in the EMR? - Is past Allergies list reviewed with Pt for accuracy & updated per protocol in the EMR? - Is Family Hx documented per protocol in the EMR? - Is Social Hx documented per protocol in the EMR (Tobacco, Drug, Alcohol)? - Is all MA portions of the Pre-Op orders (CBC, CMP, HbA1c, EKG) completed before the Provider sees the Pt? - Is the Chart Room turned to Blue for Provider in the EMR?
	Room Sports Physical	- Observation & Feedback - Passport signed by Trainer		- Is Sports PE paperwork reviewed & verified that have the correct forms? - Is Sports PE form reviewed the Pt portions are complete? - Is the Pt moved to the Provider schedule in the EMR? - Is the Pt added to the Chart Room & turned Yellow for Nurse in the EMR? - Introduction with name and credentials every time? - Is QWI chosen under Chief Complaint? - Is MA Portions of Sports PE completed before the Provider sees the Pt? - Is the Chart Room turned to Blue for Provider in the EMR?

Rooming	Room Travel Consult	- Observation & Feedback - Passport signed by Trainer		- Is the Pt moved to the Provider schedule in the EMR? - Is the Pt added to the Chart Room & turned Yellow for Nurse in the EMR? - Introduction with name and credentials every time? - Is Screening Questions asked and completed per protocol in EMR? - Is Chief Complaint documented per protocol in the EMR (including PQRST)? - Is Med list documented per protocol in the EMR (including dosages & Pharmacy)? - Is past Med list reviewed with Pt for accuracy & updated per protocol in the EMR? - Is PMH documented per protocol in the EMR? - Is past PMH list reviewed with Pt for accuracy & updated per protocol in the EMR? - Is Surgical Hx documented per protocol in the EMR? - Is past Surgical Hx list reviewed with Pt for accuracy & updated per protocol in the EMR? - Is Allergies documented per protocol in the EMR? - Is past Allergies list reviewed with Pt for accuracy & updated per protocol in the EMR? - Is Family Hx documented per protocol in the EMR? - Is Social Hx documented per protocol in the EMR (Tobacco, Drug, Alcohol)? - Is Pt Travel destination recommendations and requirements pulled before the Provider sees the Pt? - Are wait times & status communicated w/ the Pt? - Is the Chart Room turned to Blue for Provider in the EMR?
	Room USCIS 1	- Observation & Feedback - Passport signed by Trainer		- Is the Pt moved to the Provider schedule in the EMR? - Is the Pt added to the Chart Room & turned Yellow for Nurse in the EMR? - Is USCIS clicked under QWI, CC in EMR? - Is ID verified and documented? - Are vaccination records documented per USCIS protocol? - Are labs ordered & collected per protocol (2+ QFT, 18-24 NG, 18-44 RPR)? - Are vaccinations needed communicated with the Pt? - Is MedFiller completed per Protocol?
	Room USCIS 2	- Observation & Feedback - Passport signed by Trainer		- Is the Pt moved to the Provider schedule in the EMR? - Is the Pt added to the Chart Room & turned Yellow for Nurse in the EMR? - Is USCIS clicked under QWI, CC in EMR? - Is ID verified and documented? - Is Pt / Translator/ Preparer portions verified & signed? (14 and above sign own) - Are vaccination records documented per USCIS protocol? - Are labs all labs documented per protocol (2+ QFT, 18-24 NG, 18-44 RPR)? - Are vaccinations still needed communicated with the Pt? - Are wait times & status communicated w/ the Pt? - Is the Chart Room turned to Blue for Provider in the EMR?
	Room Annual Wellness	- Observation & Feedback - Passport signed by Trainer		- Is the Pt moved to the Provider schedule in the EMR? - Is the Pt added to the Chart Room & turned Yellow for Nurse in the EMR? - Introduction with name and credentials every time? - Is Wellness packet reviewed with the Pt & completed if necessary? - Is Screening Questions asked and completed per protocol in EMR? - Is Chief Complaint documented per protocol in the EMR (including PQRST)? - Is Med list documented per protocol in the EMR (including dosages & Pharmacy)? - Is past Med list reviewed with Pt for accuracy & updated per protocol in the EMR? - Is PMH documented per protocol in the EMR? - Is past PMH list reviewed with Pt for accuracy & updated per protocol in the EMR? - Is Surgical Hx documented per protocol in the EMR? - Is past Surgical Hx list reviewed with Pt for accuracy & updated per protocol in the EMR? - Is Allergies documented per protocol in the EMR? - Is past Allergies list reviewed with Pt for accuracy & updated per protocol in the EMR? - Is Family Hx documented per protocol in the EMR? - Is Social Hx documented per protocol in the EMR (Tobacco, Drug, Alcohol)? - Are wait times & status communicated w/ the Pt? - Is the Chart Room turned to Blue for Provider in the EMR?
	Room Work Comp	- Observation & Feedback - Passport signed by Trainer		- Is 827 reviewed that Pt portions completed before calling the Pt back? - Is the Pt moved to the Provider schedule in the EMR? - Is the Pt added to the Chart Room & turned Yellow for Nurse in the EMR? - Introduction with name and credentials every time? - Is Screening Questions asked and completed per protocol in EMR? - Is Chief Complaint documented per protocol in the EMR (including PQRST)? - Is Med list documented per protocol in the EMR (including dosages & Pharmacy)? - Is past Med list reviewed with Pt for accuracy & updated per protocol in the EMR? - Is PMH documented per protocol in the EMR? - Is past PMH list reviewed with Pt for accuracy & updated per protocol in the EMR? - Is Surgical Hx documented per protocol in the EMR? - Is past Surgical Hx list reviewed with Pt for accuracy & updated per protocol in the EMR? - Is Allergies documented per protocol in the EMR? - Is past Allergies list reviewed with Pt for accuracy & updated per protocol in the EMR? - Is Family Hx documented per protocol in the EMR? - Is Social Hx documented per protocol & checkboxes removed for Include in Note in the EMR (Tobacco, Drug, Alcohol)? - Is Pt prepped for a procedure if needed (ie wound clean, in a gown, standing orders)? - Are wait times & status communicated w/ the Pt? - Is the Chart Room turned to Blue for Provider in the EMR?

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Skill/ Knowledge Area	Task	Tests/Measurement	Sign-Off/Date	
Musculoskeletal	Ace Wraps	- Observation & Feedback - Passport signed by Trainer		- Is procedure explained to the Pt? - Is Ace wrap applied properly for specific body part? - Is Pt checked for poor circulation?
	Finger Splints	- Observation & Feedback - Passport signed by Trainer		- Can demonstrate buddy taping? - Can demonstrate finger static splint? - Are care instructions give to Pt?
	Splinting - Ortho Glass	- Observation & Feedback - Passport signed by Trainer		- Is able to activate ortho glass? - Can demonstrate sugar tong splint? - Can demonstrate radial gutter splint? - Can demonstrate ulnar gutter splint? - Can demonstrate long arm posterior splint?
	Synergy	- Observation & Feedback - Passport signed by Trainer		- Is billing explained to the Pt? - Is Pt set up with proper Synergy product? - Is Synergy paperwork properly completed, scanned, & put in to correct spot in the clinic?
	Slings	- Observation & Feedback - Passport signed by Trainer		- Is how to properly wear the sling explained to the Pt? - Is the Pt properly fitted for and placed in the sling?
	Wrist Splints	- Observation & Feedback - Passport signed by Trainer		- Is Exos explained to the Pt? - Is able to demonstrate proper application of Exos?
	Knee Brace	- Observation & Feedback - Passport signed by Trainer		- Is the knee brace explained to the Pt? - Is able to demonstrate proper application of Knee Brace?
	Surgical Shoe	- Observation & Feedback - Passport signed by Trainer		- Is the shoe explained to the Pt? - Is able to demonstrate proper fitting & application of shoe?
	Walking Boot	- Observation & Feedback - Passport signed by Trainer		- Is the walking boot explained to the Pt? - Is able to demonstrate proper fitting & application of the walking boot?
	Cane	- Observation & Feedback - Passport signed by Trainer		- Is walking with the cane explained & demonstrated for the Pt? (opposite side) - Is the cane properly adjusted for the Pt? (1/2 height)
	Crutches	- Observation & Feedback - Passport signed by Trainer		- Is walking with the crutches explained & demonstrated for the Pt? - Are the crutches properly adjusted for the Pt?
Emergencies	Emergency Triage	- Observation & Feedback - Passport signed by Trainer		- Can they tell you what instances would a patient bypass all other patients? (life, limb, eyesight) - Can they tell you who they need to communicate with when they initiate this process? (Provider, teammates)
	911 Calls	- Observation & Feedback - Passport signed by Trainer		- Can they tell you when to call 911? (instructed by Provider) - Can they tell you were to call 911 from? (not Front Desk) - Can they tell you how to call 911 and what info to give? (cell phone, ambulance only,Doctor on sight, address)
	Emergency Patient Transfer Form	- Observation & Feedback - Passport signed by Trainer		- Can they give you the correct Patient Transfer Form? - Can they demonstrat how to fill out the form? - Can they walk you through the process? (Call hospital, give to Provider once Triage nurse is on the phone, complete form, scan into chart, give all paperwork to Pt)
Miscellaneous	Room stocking & Inventory Expectations	- Observation & Feedback - Passport signed by Trainer		- Do they stock the rooms every night and as needed? - Can they tell you who is in charge of keeping stock ordered and organized? - Can they tell you how to communicate when inventory is low?
	Sharps Containers & Biohazard	- Observation & Feedback - Passport signed by Trainer		- Is the sharps bin changed out per protocol? (when it reaches the line) - Are the biohazard bins change out per protocol? (when 3/4 full)

MA Procedures

Skill/ Knowledge Area	Task	Tests/Measurement	Sign-Off/Date	
Cardiology	AED	- Observation & Feedback - Passport signed by Trainer		- Is CPR/BLS up to date? - Is daily AED checked and documented? - Are they able to turn on set up the machine? - Are any close to expiring/expired pads reported to the CM? - Is a low battery immediately reported to the CM?
	ECG	- Observation & Feedback - Passport signed by Trainer		- Is Pt label Printed & all information entered into the ECG Machine? - Is the ECG process process explained to the Pt? - Is the Pt prepared for ECG per protocol? (ie lotion wiped, hair removed) - Are all 10 leads properly placed? - Are 2 tracings run and reviewed for artifacts before giving to the Provider? - Is Pt left connected to the ECG until after Provider reviews the tracings? - Are all electrodes removed & Pt asked to redress after Provider has approved the tracings? - Are the ECG leads cleaned per protocol & the ECG returned to the proper place in the clinic? - Are both signed ECG tracings scanned into the EMR & properly labeled? - Is the EKG Procedure documented in EMR per protocol?
Respiratory	Nebulizer	- Observation & Feedback - Passport signed by Trainer		- Is the NEB procedure explained to the Pt? - Is NEB medication verified? - Is NEB set up properly? - Is NEB medication documented in EMR per protocol? - Are post NEB vitals taken and documented in the EMR per protocol? (BP, Pulse, O2) - Is the NEB tubing disposed of per protocol after treatment? - Is the NEB cleaned & returned to the proper place in the clinic?
	Oxygen Tank	- Observation & Feedback - Passport signed by Trainer		- Is the procedure explained to the Pt? - Is the O2 tank hooked up properly? - Is the nasal cannula/ mask placed on the Pt properly? - Is the O2 rate set per Provider instructions? - Is the nasal cannula/ mask disposed of per protocol after treatment? - Is the O2 tank turned off & returned to the proper place in the clinic?
	Spirometry	- Observation & Feedback - Passport signed by Trainer		- Is the proper paperwork completed before the PFT? - Is the PFT procedure explained & demonstrated for the Pt? - Is the Pt properly prepared for PFT? (tight clothes, dentures, tongue ring) - Is the appropriate information entered into the Spirometer? - Are 3 passing tests, but of a Max of 8 tests completed? - Is PFT report printed & given to Provider for review or Employer Paperwork completed? - Is the transducer disposed of per protocol after procedure? - Is Spirometer clean & returned to the proper place in the clinic? - Is the signed PFT scanned into the EMR & properly labeled?
Head & Ent	Ear Lavage	- Observation & Feedback - Passport signed by Trainer		- Is the procedure explained to the Pt? - Is the Pt properly prept per protocol? (gown, chux, debrox) - Is correct water temp & amount of hydrogen peroxide added? - Is ear lavage performed per protocol? - Are tools available for MA used per protocol? (curette, otoscope, specula) - Is Provider asked to check ears post procedure? - Is the Procedure documented in EMR per protocol?
	Eye Tray/ Eye flush	- Observation & Feedback - Passport signed by Trainer		- Can they identify fluorescein? - Can they identify proparacaine & where it is stored? (fridge) - Is wood's lamp tested before Provider enters the room? - Is the eye flush procedure explained to the Pt? - Is Pt properly prep for eye flush? - Is eye flush completed per protocol? (eyewash/ sterile saline)
	Visual Acuity: Snellen	- Observation & Feedback - Passport signed by Trainer		- Is the proper Snellen chart chosen for the Pt? (letters/shapes) - Is Snellen completed/ results interpreted per protocol per protocol? (right/left/both) - Is Snellen documented in the EMR/ paperwork per protocol?
	Visual Acuity: Ishihara	- Observation & Feedback - Passport signed by Trainer		- Is the Ishihara procedure explained to the Pt? - Is the Ishihara completed/ results interpreted per protocol? - Is the Ishihara results documented per protocol? (EMR/Paperwork)
	Visual Acuity: Jaeger	- Observation & Feedback - Passport signed by Trainer		- Is the Jaeger procedure explained to the Pt? - Is the Jaeger completed/ results interpreted per protocol? - Is the Jaeger results documented per protocol? (EMR/Paperwork)

Procedures/ Patient Preparation	Abscess Draining/Dressing	- Observation & Feedback - Passport signed by Trainer		- Is Pt prept & procedure explained? - Can identify & find all items needed for procedure - Is able to assist the Provider? - Is abscess site properly dressed? - Are care instructions explained to the Pt?
	Laceration Care	- Observation & Feedback - Passport signed by Trainer		- Is Pt prept & procedure explained? - Is Pt asked about tetanus status? - Can identify & find all items needed for procedure. - Is able to assist the Provider? - Is laceration site properly dressed? - Are care instructions explained to the Pt?
	Pelvic Tray set up	- Observation & Feedback - Passport signed by Trainer		- Are all items needed for the procedure on the tray? - Are Pt instructions & prep done? (gown) - Can assist Provider with procedure? - Are correct swabs given to Provider in the correct order?
	Steri-strips	- Observation & Feedback - Passport signed by Trainer		- Is Pt prept & procedure explained? - Are steri-stips applied properly to the Pt per protocol?
	Surgical Tray set up	- Observation & Feedback - Passport signed by Trainer		- Can identify & find all items needed to set up a surgical tray? - Does the tray remain sterile during the entire set up? - Are the Provider's sterile gloves set up per protocol? - Are all non-sterile items needed set aside from the tray? (on counter)
	Suture/ Staple Removal	- Observation & Feedback - Passport signed by Trainer		- Is previous note reviewed for date & number of sutures/staples placed? - Is Provider asked to check & give approval for removal? - Is removal procedure explained to the Pt? - Are sutures/ staples removed verified as number being placed & documented in the chart?
	Wound Care/Dressing Follow Up	- Observation & Feedback - Passport signed by Trainer		- Is Procedure explained to the Pt? - Is the wound made available for the Provider to see during rooming process? - Is the wound cleaned/ debrided per protocol? - Can identify & find all items needed to dress wound? - Is able to properly dress at least 3 different kinds of wound sites? (face, finger, knee)

Vaccination/ Med Admin

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Skill/ Knowledge Area	Task	Tests/Measurement	Sign-Off/Date	
Vaccinations/ Med Administration	"Rights of Medication Administration"	- Observation & Feedback - Passport signed by Trainer		- Can they give the "Rights of Medication Administration"? (Pt, Med, Dose, Route, Time, Documentation) - Is this always followed?
	Use of Vaccination Information Sheets	- Observation & Feedback - Passport signed by Trainer		- Can they demonstrate pulling the correct VIS? - Can they demonstrate when to give the VIS?
	Medication Administration	- Observation & Feedback - Passport signed by Trainer		- Are they able to find the correct medication ordered by the Provider/ - Do they mix medications with the correct reagent? (diluent, lidocaine) - Can they demonstrate how to administer at least 1 IM Gluteus medication? - Can they demonstrate how to administer at least 1 PO medication? - Are they able to document medication administration in the EMR?
	PPD	- Observation & Feedback - Passport signed by Trainer		- Can they tell you what the dosage is? - Can they demonstrate how to administer PPD? (route, wheel) - Can they complete the PPD form & Document in the EMR for PPD given? - Can they tell you what the dosage is? - Can they give proper f/u instructions to the Pt? - Can they properly read the PPD test & document the form? - Is the PPD form scanned into the Pt chart & properly labeled?
	Hep A	- Observation & Feedback - Passport signed by Trainer		- Is the VIS for Hep A given to the Pt every time? - Can they tell you if this is attenuated or Inactivated? - Can they tell you what the dosage is? - Can they demonstrate how to administer Hep A? (route) - Is the Pt asked to remain in the Exam room for at least 15 min? (not lobby) - Do they complete the Hep A documentation in EMR? - Is vaccination record printed and given to Pt?
	Hep B	- Observation & Feedback - Passport signed by Trainer		- Is the VIS for Hep B given to the Pt every time? - Can they tell you if this is attenuated or Inactivated? - Can they tell you what the dosage is? - Can they demonstrate how to administer Hep B? (route) - Is the Pt asked to remain in the Exam room for at least 15 min? (not lobby) - Do they complete the Hep B documentation in EMR? - Is vaccination record printed and given to Pt?
	Meningococcal	- Observation & Feedback - Passport signed by Trainer		- Is the VIS for Meningococcal given to the Pt every time? - Can they tell you if this is attenuated or Inactivated? - Can they tell you what the dosage is? - Can they demonstrate how to administer Meningococcal ? (route) - Is the Pt asked to remain in the Exam room for at least 15 min? (not lobby) - Do they complete the Meningococcal documentation in EMR? - Is vaccination record printed and given to Pt?
	MMR	- Observation & Feedback - Passport signed by Trainer		- Is the VIS for MMR given to the Pt every time? - Can they tell you if this is attenuated or Inactivated? - Can they tell you what the dosage is? - Can they demonstrate how to administer MMR? (route) - Is the Pt asked to remain in the Exam room for at least 15 min? (not lobby) - Do they complete the MMR documentation in EMR? - Is vaccination record printed and given to Pt?
	Polio	- Observation & Feedback - Passport signed by Trainer		- Is the VIS for Polio given to the Pt every time? - Can they tell you if this is attenuated or Inactivated? - Can they tell you what the dosage is? - Can they demonstrate how to administer Polio? (route) - Is the Pt asked to remain in the Exam room for at least 15 min? (not lobby) - Do they complete the Polio documentation in EMR? - Is vaccination record printed and given to Pt?
	Tdap	- Observation & Feedback - Passport signed by Trainer		- Is the VIS for Tdap given to the Pt every time? - Can they tell you if this is attenuated or Inactivated? - Can they tell you what the dosage is? - Can they demonstrate how to administer Tdap? (route) - Is the Pt asked to remain in the Exam room for at least 15 min? (not lobby) - Do they complete the Tdap documentation in EMR? - Is vaccination record printed and given to Pt?
	Typhoid (Typhim)	- Observation & Feedback - Passport signed by Trainer		- Is the VIS for Typhoid given to the Pt every time? - Can they tell you if this is attenuated or Inactivated? - Can they tell you what the dosage is? - Can they demonstrate how to administer Typhoid? (route) - Is the Pt asked to remain in the Exam room for at least 15 min? (not lobby) - Do they complete the Typhoid documentation in EMR? - Is vaccination record printed and given to Pt?

	Varicella	- Observation & Feedback - Passport signed by Trainer		- Is the VIS for Varicella given to the Pt every time? - Can they tell you if this is attenuated or Inactivated? - Can they tell you what the dosage is? - Can they demonstrate how to administer Varicella? (route) - Is the Pt asked to remain in the Exam room for at least 15 min? (not lobby) - Do they complete the Varicella documentation in EMR? - Is vaccination record printed and given to Pt?
	Yellow Fever (YF-Vax)	- Observation & Feedback - Passport signed by Trainer		- Is the VIS for Varicella given to the Pt every time? - Can they tell you if this is attenuated or Inactivated? - Can they tell you what the dosage is? - Can they demonstrate how to administer Varicella? (route) - Is the Pt asked to remain in the Exam room for at least 15 min? (not lobby) - Do they complete the Varicella documentation in EMR? - Is vaccination record printed and given to Pt?

Laboratory

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Skill/ Knowledge Area	Task	Tests/Measurement	Sign-Off/Date	
Laboratory	Specimen Labeling (2 Patient Identifiers)	- Observation & Feedback - Passport signed by Trainer		- Are 2 Pt identifiers always used before collecting Pt samples? - Are Pt samples always labeled before entering the lab?
	Uses Proper Venipuncture Technique	- Observation & Feedback - Passport signed by Trainer		- Are proper venipuncture techniques used?
	Are Labs Properly Ordered & Documented	- Observation & Feedback - Passport signed by Trainer		- Are all Labs ordered per protocol before samples are collected? - Are all Labs documented per protocol in the correct Lab binder? - Are all results documented in the EMR per protocol?
	M-Series - Patient Labs	- Observation & Feedback - Passport signed by Trainer		- Is purple EDTA blood specimen tube used? - Is VID 1 & 2 always entered into the M-series? - Are Tech initials always entered under operator ID? - Are samples always mixed (8X8X8X8) before running the sample? - Is specimen ran per manufacturer specifications using best practices? - Are critical value procedures followed? - Is any remaining Pt sample and blood tube discarded in the sharps container?
	M-Series - Controls & Maintenance	- Observation & Feedback - Passport signed by Trainer		- Is daily maintenance completed and documented per protocol? - Are reagent levels checked and documented as part of daily maintenance per protocol? - Are controls set out for 30 min but not more than 45 min before running? - Is the background ran and reviewed before running controls? - Are controls ran in order low, normal, high? - Is corrective action taken when controls are out of range per protocol? - Is corrective action documented per protocol? - Are control tubes documented with open date, expiration date, and initials when opened per protocol? - Is the background and control print outs placed in the M-Series binder
	Piccolo - Patient Labs	- Observation & Feedback - Passport signed by Trainer		- Is green lithium-heparin blood specimen tube used? - Is VID always entered and questions answered in the Piccolo? - Is specimen ran per manufacturer specifications? - Are critical value procedures followed? - Is any remaining Pt sample and blood tube discarded in the sharps container?
	Piccolo - Controls & Maintenance	- Observation & Feedback - Passport signed by Trainer		- Is daily maintenance completed and documented per protocol? - Is daily IQC completed per protocol? - Is EQC completed per protocol when a new box of disks opened and every 30 days? - Is Piccolo EQC form completed per protocol? - Is disk box documented per protocol once they pass EQC? - Is the completed Piccolo EQC form placed in the Piccolo binder per protocol? - Is corrective action taken when controls are out of range per protocol? - Is corrective action documented per protocol? - Are control tubes documented with open date, expiration date, and initials when opened per protocol? - Is the manufacturer expiration date circled on the disk box? - When a new box of controls are opened is the box documented per protocol? - Is the control insert documented and placed in the Piccolo binder per protocol when new control vials are opened?
	Finger Glucose - Patient Labs	- Observation & Feedback - Passport signed by Trainer		- Is blood sample collected using proper finger stick technique used? - Is specimen ran per manufacturer specifications? - Are critical value procedures followed? - Is strip used discarded in the biohazard bin?
	Finger Glucose - Controls	- Observation & Feedback - Passport signed by Trainer		- Is EQC completed per protocol when a new bottle is opened, weekly, and if meter is dropped? - Is EQC documented in the CLIA waived binder per protocol? - Is corrective action taken when controls are out of range per protocol? - Is corrective action documented per protocol? - Is the test strip bottle documented with Opened - Passed EQC, date, initials and expiration date per protocol when a new bottle of strips is opened? - Is the manufacturer expiration date circled on the strip bottle? - Is the control vial documented with open date, expiration date, and initials per protocol when a new control vial is opened?

HbA1C - Patient Labs	- Observation & Feedback - Passport signed by Trainer		- Is blood sample collect per protocol (finger stick, Lavender EDTA, or Green Lithium-Heparin)? - Is cartridge set out for 15 min before using? - Is VID always entered? - Is cartridge ran per manufacturer specifications? - Are critical value procedures followed and documented per protocol? - Are procedures followed when there is an error code? - Is any remaining Pt sample and blood tube discarded in the sharps container? - Is the Pt test cartridge discarded in the biohazard bin?
HbA1C - Controls & Maintenance	- Observation & Feedback - Passport signed by Trainer		- Is daily maintenance completed and documented per protocol? - Is EQC completed per protocol when a new box is opened and every 30 days? - Is EQC documented in the CLIA waived binder per protocol? - Is corrective action taken when controls are out of range per protocol? - Is corrective action documented per protocol? - Is the cartridge box documented with Opened - Passed EQC, date & initials per protocol? - Is the manufacturer expiration date circled on the cartridge box? - Are the control vials documented with open date, expiration date, and initials per protocol when new control vials are opened? - Is the control insert documented and placed in the CLIA waived binder per protocol when new control vials are opened?
hCG - Patient Labs	- Observation & Feedback - Passport signed by Trainer		- Is clean catch procedure explained to the Pt? - Is specimen ran per manufacturer specifications? - Is any remaining Pt sample discarded in the toilet or sink (as long as there is no visible blood)? - Is the UA collection cup discarded in the biohazard bin? - Is the Pt test strip discarded in the biohazard bin?
hCG - Controls	- Observation & Feedback - Passport signed by Trainer		- Is EQC completed per protocol when a new box is opened and every 30 days? - Is EQC documented in the CLIA waived binder per protocol? - Is corrective action taken when controls are out of range per protocol? - Is corrective action documented per protocol? - Is the test strip box documented with Opened - Passed EQC, date & initials per protocol? - Is the manufacturer expiration date circled on the strip box? - Are the control vials documented with open date, expiration date, and initials per protocol when new control vials are opened? - Is the control insert documented and placed in the CLIA waived binder per protocol when new control vials are opened?
ID Now - Patient Labs	- Observation & Feedback - Passport signed by Trainer		- Is Proper swab collected using proper technique? - Is VID always entered? - Is specimen ran per manufacturer specifications? - Is the Pt test cassette and swab discarded in the biohazard bin?
ID Now - Controls	- Observation & Feedback - Passport signed by Trainer		- Is EQC completed per protocol when a new box is opened? - Is EQC documented in the ID Now waived binder per protocol? - Is corrective action taken when controls are out of range per protocol? - Is corrective action documented per protocol? - Is the test cassette box documented with Opened - Passed EQC, date & initials per protocol? - Is the manufacturer expiration date circled on the kit box?
Mono - Patient Labs	- Observation & Feedback - Passport signed by Trainer		- Is blood sample collected using proper finger stick technique? - Is the test cassette labeled w/ 2 Pt identifiers? - Is specimen ran per manufacturer specifications? - Is the Pt test cassette and pipette discarded in the biohazard bin?
Mono - Controls	- Observation & Feedback - Passport signed by Trainer		- Is EQC completed per protocol when a new box is opened and every 30 days? - Is cassette box documented per protocol once they pass EQC? - Is EQC documented in the CLIA waived binder per protocol? - Is corrective action taken when controls are out of range per protocol? - Is corrective action documented per protocol? - Is the test kit box documented with Opened - Passed EQC, date & initials per protocol? - Is the manufacturer expiration date circled on the kit box?
SARS Antigen - Patient Labs	- Observation & Feedback - Passport signed by Trainer		- Is nasal swab collected using proper technique? - Is VID always entered into the Sofia 2? - Is specimen ran per manufacturer specifications? - Is reagent vial discarded in the sharps container? - Is Pt swab & test cassette discarded in the biohazard bin?
SARS Antigen - Controls & Maintenance	- Observation & Feedback - Passport signed by Trainer		- Is daily maintenance completed and documented per protocol? - Is daily IQC completed per protocol? - Is EQC completed per protocol with every new shipment AND new lot? - Is EQC documented in the Sofia 2 binder per protocol? - Is cassette box documented per protocol once they pass EQC? - Is the manufacturer expiration date circled on the cassette box? - Is corrective action taken when controls are out of range per protocol? - Is corrective action documented per protocol?

Urine Analysis - Patient Labs	- Observation & Feedback - Passport signed by Trainer		- Is clean catch procedure explained to the Pt? - Is the correct specimen cup chosen (sterile vs non)? - Is VID always entered? - Is specimen ran per manufacturer specifications? - Is the UA results print out placed on the In House Specimen results form under Urinalysis per protocol? - Is any remaining Pt sample discarded in the toilet or sink (as long as there is no visible blood)? - Is the UA collection cup discarded in the biohazard bin? - Is the Pt test strip discarded in the biohazard bin?
Urinalysis - Controls	- Observation & Feedback - Passport signed by Trainer		- Is EQC completed per protocol when a new tube is opened and weekly (Sunday)? - Is EQC documented in the CLIA waived binder per protocol? - Is corrective action taken when controls are out of range per protocol? - Is corrective action documented per protocol? - Is the test strip bottle documented with Opened - Passed EQC, date & initials per protocol? - Is the manufacturer expiration date circled on the strip bottle? - Are the control vials documented with open date, expiration date, and initials per protocol when new control vials are opened? - Is the control insert documented and placed in the CLIA waived binder per protocol when new control vials are opened?
In House Lab Documentation	- Observation & Feedback - Passport signed by Trainer		- Is the In House Lab Log documented per protocol? - Are the results entered into the EMR per protocol for the specific test system?
Reference Labs Patient Specimen Collection	- Observation & Feedback - Passport signed by Trainer		- Are specimen collection process and send out requirements looked up in Accudraw/ HCL every time? - Are samples collected per Accudraw/ HCL requirements? - Are all samples labeled with the proper labels? - Are all samples processed per Accudraw/HCL requirements? - Is the Reference Lab Binder documented per protocol?
Reference Lab Results	- Observation & Feedback - Passport signed by Trainer		- Are results completed in the Lab Queue per protocol using the correct stock note?
Centrifuge Use and Maintenance	- Observation & Feedback - Passport signed by Trainer		- Are SST sample let sit for 30 min before centrifuging? - Are all other tubes let sit for 15 min before centrifuging? - Is the centrifuge lid closed after use?
Autoclave Use and Maintenance	- Observation & Feedback - Passport signed by Trainer		- Are instruments placed in the package per protocol? - Is an indicator stip always placed in the package face up? - Is the package labeled with instrument name, date and packagers initials? - Is weekly maintenance completed and documented in the Autoclave binder per protocol? - Is monthly maintenance completed and documented in the Autoclave binder per protocol? - Is the weekly incubation run and documented per protocol?
Lab Temperature documentation	- Observation & Feedback - Passport signed by Trainer		- Is the lab fridge temp documented twice daily per protocol? - Is the lab freezer temp documented twice daily per protocol? - Is the lab temp documented twice daily per protocol? - Is the lab humidity documented twice daily per protocol.? - Is the lab temp log documented per protocol when temps are not within required ranges?
Med Temperature documentation	- Observation & Feedback - Passport signed by Trainer		- Is the medication fridge temp documented twice daily per protocol? - Is the medication freezer temp documented twice daily per protocol? - Is the medication temp log documented per protocol when temps are not within required ranges?
Emergency Eyewash Use and documentation	- Observation & Feedback - Passport signed by Trainer		- Is the eyewash station checked weekly and documented in the CLIA binder per protocol?
Fire extighuisher Use and documentation	- Observation & Feedback - Passport signed by Trainer		- Is the fire extinguisher checked weekly and documented in the CLIA binder per protocol?

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Skill/ Knowledge Area	Task	Tests/Measurement	Sign-Off/Date	Sign-Off/Date
Occupational Medicine (OCC MED)	Audiometer	- Observation & Feedback - Passport signed by Trainer		- Is Audio Calibration check run per protocol & documented in the Audio binder per protocol? - Is Employer Audio Protocol reviewed & verified that have the correct Audio form? - Is Pt portion reviewed for completeness before performing Audio check? - Is Audio process explained to the patient? - Is the Audio ran per protocol for automatic testing? - Is the Audio ran per protocol for Manual testing? - Is the audio form filled out correctly? - Is the audio form reviewed for completeness before sending to Employer? - Is the audio form sent to the Employer per protocol? - Is the Pt chart documented per protocol that Audio was sent to employer? - Is the audio form scanned into the Pt chart & properly labeled?
	DOT Physical	- Observation & Feedback - Passport signed by Trainer		- Is Employer DOT Protocol reviewed ? - Is Pt weight & height always measured (not by asking the Pt)? - Is blood pressure taken per FMCSA Standards? - Is pulse taken per FMCSA Standards? - Is visual acuity (Snellen) measured per FMCSA Standards? - Is peripheral vision measured per FMCSA Standards? - Is whisper test administered per per FMCSA Standards? - Is urine dip completed & documented per protocol? - Is MA portion of CerteDrive completed per protocol? - Is the MEC & Long Form sent to the Employer per protocol? - Is the Pt chart documented per protocol that DOT paperwork was sent to employer? - Is the MEC & Long Form scanned into the Pt chart & properly labeled?
	HPE/WFT	- Observation & Feedback - Passport signed by Trainer		- Is Employer HPE/WFT Protocol reviewed & verified that have the correct HPE/WFT form(s)? - Is AFC HPE Pre-Test Screening Standard Form completed before any HPE/WFT is completed? - Is the Pt instructed on proper lifting techniques? - Is the HPE/WFT followed & completed per protocol? - Is the HPE/WFT sent to Employer per protocol? - Is the Pt chart documented per protocol that HPE/WFT paperwork was sent to employer? - Is the HPE/WFT scanned into the Pt chart & properly labeled?
	OSHA Respirator Approval	- Observation & Feedback - Passport signed by Trainer		- Is Employer OSHA Respirator Approval Protocol reviewed & verified that have the correct OSHA Respirator form(s)? - Is OSHA Respirator Questionnaire verified that it has been completed before giving to the Provider? - Is the OSHA Respirator Use Approval form reviewed for completeness before sending to Employer? - Is only the OSHA Respirator Use Approval form sent to the Employer per protocol? - Is the Pt chart documented per protocol that OSHA Respirator Use Approval paperwork was sent to employer? - Is the OSHA Respirator Questionnaire & OSHA Respirator Use Approval scanned into the Pt chart & properly labeled?
	Pre-Employment PE	- Observation & Feedback - Passport signed by Trainer		- Is Employer Pre-Employment PE Protocol reviewed & verified that have the correct Pre-Employment PE forms? - Is Pt portion of the Pre-Employment PE reviewed for completeness before performing MA portion? - Is MA portions of Pre-Employment PE forms completed before giving to the Provider? - Is the Pre-Employment PE forms reviewed for completeness before sending to Employer? - Is the Pre-Employment PE forms sent to Employer per protocol? - Is the Pt chart documented per protocol that Pre-Employment PE forms paperwork was sent to employer? - Is the Pre-Employment PE forms scanned into the Pt chart & properly labeled?

Respirator Fit Test	- Observation & Feedback - Passport signed by Trainer		- Is Employer Respirator Fit Test Protocol reviewed & verified that have the correct Respirator Fit Test form? - Is OSHA Respirator Use Approval verified completed before any Respirator Fit Test is completed? - Is Pt portion of the Respirator Fit Test reviewed for completeness before performing MA portion? - Is the Respirator Fit Test followed & completed per protocol? - Is the Respirator Fit Test sent to Employer per protocol? - Is the Pt chart documented per protocol that Respirator Fit Test paperwork was sent to employer? - Is the Respirator Fit Test scanned into the Pt chart & properly labeled?
BAT	- BAT Certification - Passport signed by Training Manager		- Is Employer BAT Protocol reviewed & verified that have the correct BAT CCF? - Is Step 1 of the BAT CCF reviewed for completeness before administering the test? - Is BAT process explained to the Pt? - Is BAT screening test administered per Federal Regulations? - Is 15 min wait time observed if test is 0.020 or above? - Is BAT confirmation test administered per Federal Regulations (if needed)? - Is Calibration check completed & documented per Federal Regulations (if needed)? - Is Employer contacted if Pt has a "Refusal to Test" or "Positive" test? - Is the BAT CCF reviewed for completeness before sending to Employer? - Is the BAT CCF sent to Employer per protocol? - Is the Pt chart documented per protocol that BAT CCF was sent to employer? - Is the BAT CCF scanned into the Pt chart & properly labeled?
DS	- DS Certification - Passport signed by Training Manager		- Is Employer DS Protocol reviewed & verified that have the correct DS CCF? - Is Step 1 of the DS CCF reviewed for completeness before administering the test? - Is DS collection process explained to the Pt? - Is DS collection administered per Federal Regulations? - Is Employer contacted if Pt has a "Refusal to Test" or second collection under direct observation? - Is the DS CCF reviewed for completeness before sending to Employer? - Is the DS CCF sent to Employer per protocol? - Is the DS CCF sent to MRO per protocol? - Is the Pt chart documented per protocol that DS CCF was sent to Employer & MRO? - Is the DS CCF scanned into the Pt chart & properly labeled?
Hair Collection	- Hair Collection Certification - Passport signed by Training Manager		- Is Employer Hair Collection Protocol reviewed & verified that have the correct Hair Collection CCF? - Is Step 1 of the Hair Collection CCF reviewed for completeness before administering the test? - Is Hair collection process explained to the Pt? - Is Hair collection administered per Regulations? - Is Employer contacted if Pt has a "Refusal to Test"? - Is the Hair Collection CCF reviewed for completeness before sending to Employer? - Is the Hair Collection CCF sent to Employer per protocol? - Is the Hair Collection CCF sent to MRO per protocol? - Is the Pt chart documented per protocol that Hair Collection CCF was sent to Employer & MRO? - Is the Hair Collection CCF scanned into the Pt chart & properly labeled?

| | Oral Collection | - Oral Collection Certification
- Passport signed by Training Manager | | - Is Employer Oral Collection Protocol reviewed & verified that have the correct Oral Collection CCF?
- Is Step 1 of the Oral Collection CCF reviewed for completeness before administering the test?
- Is Oral collection process explained to the Pt?
- Is Oral collection administered per Regulations?
- Is Employer contacted if Pt has a "Refusal to Test"?
- Is the Oral Collection CCF reviewed for completeness before sending to Employer?
- Is the OralCollection CCF sent to Employer per protocol?
- Is the Oral Collection CCF sent to MRO per protocol?
- Is the Pt chart documented per protocol that Oral Collection CCF was sent to Employer & MRO?
- Is the Oral Collection CCF scanned into the Pt chart & properly labeled? |

RT/ LXMO

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Skill/ Knowledge Area	Task	Tests/Measurement	Sign-Off/Date	
Radiology	Turn on/off the machine	- Observation & Feedback - Passport signed by Trainer		-Turn on main breaker -Log into imaging system per clinics x ray manual -Warm up the machine per your clinics x ray manuel
	Send out images for overreads	- Observation & Feedback - Passport signed by Trainer		-Send/Upload image(s) to Onepacs per your clinics system -Log into OnePacs -Find and select your study -Enter History, Study Type, Physician name, and If there is a comparison -Confirm for interpretation
	Print overread reports	- Observation & Feedback - Passport signed by Trainer		-In OnePacs, once a green check mark shows up in the Toolbar click the Icon that's a paper with a magnifying glass and print the completed report
	Scanning of overread reports	- Observation & Feedback - Passport signed by Trainer		-Give report to the provide to review and sign off -Locate the patient in Docutap -Scan report using iOs scan -Upload to patients chart using the "Description" The body part and the date, and the "Image Type" as Radiology
	Troubleshooting 101	- Observation & Feedback - Passport signed by Trainer		
	Forms & Proper Handling Procedures	- Observation & Feedback - Passport signed by Trainer		-Have women of childbearing age fill out pregnancy consent form -Scan into patient's chart
Manual Upload	Uploading Manually to OnePacs	- Observation & Feedback - Passport signed by Trainer		See Document, Sending X-Rays

Discharge

Skill/ Knowledge Area	Task	Tests/Measurement	Sign-Off/Date	
Discharging	Discharge Urgent Care Patient	- Observation & Feedback - Passport signed by Trainer		- Is discharge paperwork reviewed with the Pt? - Is the Pt walked to the door? - Is the Chart Room turned to No Flag in the EMR?
	Discharge MVA	- Observation & Feedback - Passport signed by Trainer		- Is discharge paperwork reviewed with the Pt? - Is the Pt walked to the door? - Is the Chart Room turned to No Flag in the EMR?
	Discharge Pre-Op	- Observation & Feedback - Passport signed by Trainer		- Is discharge paperwork reviewed with the Pt? - Is the Pt walked to the door? - Is the Chart Room turned to No Flag in the EMR? - Is the Pre-Op Paperwork reviewed for completeness before sending to ordering Provider? - Is the Pre-Op Paperwork sent to ordering Provider per protocol? - Is the Pt chart documented per protocol that Pre-Op Paperwork paperwork was sent to ordering Provider? - Is the Pre-Op Paperwork scanned into the Pt chart & properly labeled?
	Discharge Sports Physical	- Observation & Feedback - Passport signed by Trainer		- Is Sport PE Paperwork reviewed for completeness before Pt is discharged? - Is the Sport PE Paperwork scanned into the Pt chart & properly labeled? - Is the Pt walked to the door? - Is the Chart Room turned to No Flag in the EMR?
	Discharge Travel Consult	- Observation & Feedback - Passport signed by Trainer		- Are any vaccinations entered into Med Administration? - Is a copy of the vaccination record given to the Pt? - Is discharge paperwork reviewed with the Pt? - Is the Pt walked to the door? - Is the Chart Room turned to No Flag in the EMR?
	Discharge USCIS 1	- Observation & Feedback - Passport signed by Trainer		- Is Pt checked in for a Quick visit and vaccinations given (If wanted/needed & Billing Insurance)? - Is Pt informed if they will need a translator for visit with Civil Surgeon? - Is USCIS 2 scheduled/ confirmed scheduled? - Is the Pt walked to the door? - Is the Chart Room turned to No Flag in the EMR? - Is USCIS folder properly filed?
	Discharge USCIS 2	- Observation & Feedback - Passport signed by Trainer		- Is I-693 verified for accuracy? - Is all supporting documentation verified? - Is all paperwork scanned into the Pt chart? - Is a copy of all paperwork going into the packet given to the Pt? - Is the properly sealed envelope given to the Pt? - Is the Pt walked to the door? - Is the Chart Room turned to No Flag in the EMR?
	Discharge Annual Wellness	- Observation & Feedback - Passport signed by Trainer		- Is discharge paperwork reviewed with the Pt? - Is the Pt walked to the door? - Is the Chart Room turned to No Flag in the EMR?
	Room Work Comp	- Observation & Feedback - Passport signed by Trainer		- Is a follow up appointment scheduled for the Pt? - Is a copy of the 3245 completed and given to the Pt? - Is discharge paperwork reviewed with the Pt? - Is the Pt walked to the door? - Is the Chart Room turned to No Flag in the EMR? - Is the all WC paperwork sent to the appropriate place by the end of the shift?

CORE VALUES

COMMITMENT
Commitments are clearly made and met!

HEALTH
Healthy living for everyone is Promoted through sustainable and responsible behaviors!

EXCELLENCE
Excellence in everything we do!

CELEBRATE
Celebrate wins - both small and large!

TRUST
Trust builds teamwork through Vulnerability and respect!