

Staff Name \_\_\_\_\_ Job Title \_\_\_\_\_

Practice \_\_\_\_\_ Date of Review \_\_\_\_\_

Job Category that can perform competency RN LVN HA/MA

	Behavior/Skill Criteria	Criteria Met		
		MSE	Date	Reviewer initials
<b>Purpose</b>	To standardize clinic opening, room turnover, and closing procedures in the Ambulatory practices.	V		
<b>Opening Procedures</b>	<b>Exam / Procedure Room Set-Up</b> <ol style="list-style-type: none"> <li>Turn on all lights in the room.</li> <li>Remove loose papers/items. Discard Protected Health Information (PHI) in the shred bin.</li> <li>Check sharps containers, replace if 2/3 full.</li> <li>Check supplies and restock as necessary, anticipating need for commonly used items:                             <ul style="list-style-type: none"> <li>Medical supplies</li> <li>Gowns/Linens</li> <li>Forms</li> </ul> </li> <li>Check electrical equipment to ensure working properly. If not:                             <ul style="list-style-type: none"> <li>Alert your supervisor</li> <li>Remove from the room</li> <li>Red tag the item</li> <li>Contact Clinical Engineering to repair as appropriate</li> </ul> </li> <li>Set up all appropriate waste bins according to provider preference, if applicable.</li> <li>Ensure enough chairs in the room.</li> <li>Remove unnecessary or out of date items to reduce clutter.</li> </ol>	V,O		
	<b>Emergency Kit</b> <ol style="list-style-type: none"> <li>Check lock is secured.</li> <li>Review all expiration dates on box label.                             <ul style="list-style-type: none"> <li>Earliest expiration date on the list indicates box expiration.</li> </ul> </li> <li>Notify supervisor immediately if E-kit is opened or expired.</li> <li>Verify Material Service and Pharmacy signatures are on label.                             <ul style="list-style-type: none"> <li>If either is missing, contact appropriate department to review.</li> </ul> </li> <li>Complete Emergency Equipment Daily Checklist.</li> </ol>	V,O,RD		
	<b>Oxygen Tank(s)</b> <ol style="list-style-type: none"> <li>Check the oxygen tank(s) to ensure that it has at least at 1000mm of pressure. (2000mm=full; 1000mm=acceptable for short term use.) Log results on Emergency Supplies log sheet.</li> <li>Contact Material Services (or other designated vendor) to replace the oxygen tank as appropriate.</li> </ol>	V,O,RD		
	<b>Temperature Checks</b> <u>POCT/Supply Room, Specimen Refrigerator, Patient Food Refrigerator, Blanket Warmer</u> <ul style="list-style-type: none"> <li>Read thermometer range and current temperature, record all values per requirements on Temperature Monitoring Log. If out of range, re-QC POCT items and notify supervisor and/or Facilities. Document name of people notified and actions taken on the log.</li> </ul> <u>Medication Refrigerator</u> <ul style="list-style-type: none"> <li>Read thermometer range and current temperature, record all values per requirements on Temperature Monitoring Log. If out of range and door is open, close door and check temperature again in 30 minutes. If out of range and door is closed, notify supervisor and Pharmacy. Document name of people notified and actions taken on the log.</li> </ul> <p>If practice is closed, write abbreviation "NIU" (Not In Use) for dates that practice is closed on log(s).</p>	V,O,RD		

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Opening Procedures (continued)	<b>Schedules &amp; Room Assignments</b> <ol style="list-style-type: none"> <li>Ensure schedules for providers are available in designated areas.</li> <li>Assign rooms to providers and place provider nameplates outside of corresponding rooms.                             <ul style="list-style-type: none"> <li>To improve clinic efficiency, be mindful of half-day or light provider schedules.</li> </ul> </li> </ol>	V,O		
	<b>Instruments (If Applicable)</b> <ol style="list-style-type: none"> <li>Pick up sterile instruments from Sterile Processing Department (SPD).</li> <li>Ensure physical instrument counts match counts on SPD Requisition Form.</li> </ol>	V,O		
	<b>Supplies (Expiration Checks)</b> <ol style="list-style-type: none"> <li>At least once per month, check for and remove any supplies that are expired or will expire by the end of the month from each exam room and clean storage room.</li> <li>Return any unopened and expired pharmaceutical supplies to Pharmacy.</li> <li>Discard any opened and expired pharmaceutical supplies into appropriate waste bin.                             <ul style="list-style-type: none"> <li>Reference "Managing Sharps, Pharmaceutical &amp; Hazardous Waste" poster for guidance.</li> </ul> </li> <li>When restocking supplies, place items with earlier expiration dates in the front.</li> </ol>	V,O,RD		
Room Turnover	<b>Remove Items</b> <ol style="list-style-type: none"> <li>Ensure patient has left exam room.</li> <li>Remove and process any labeled lab specimens. Unlabeled specimens must be handled per policy.</li> <li>Remove used instruments and transport to soiled utility area per policy.</li> <li>Remove all paperwork and discard per policy. PHI must be discarded in the shred bin.</li> </ol>	V,O,RD		
	<b>Clean Room</b> <ol style="list-style-type: none"> <li>Place used gowns and pillow case in soiled linen bin.</li> <li>Remove and discard exam table paper.</li> <li>Wipe with UCSF-approved disinfectant and allow to dwell (i.e., remain wet) per instructions on container:                             <ul style="list-style-type: none"> <li>Equipment (e.g., mayo stands, infusion pumps, dialysis machines, etc.)</li> <li>Countertops and other high touch surfaces</li> <li>Exam/procedure tables, chairs, and pillows</li> <li>Overhead light handles</li> </ul> </li> <li>Discard waste produced during procedure into appropriate bin.</li> </ol>	V,O,RD		
	<b>Prepare for Next Patient</b> <ol style="list-style-type: none"> <li>Replace exam table paper after disinfectant has dried.</li> <li>Replace pillow case, if applicable.</li> <li>Place clean gown and/or other required linen on end of exam table, if applicable.</li> <li>Prepare supplies necessary for next appointment.</li> </ol>	V,O,RD		
	<b>Complete Clinic-Specific Room Turnover Tasks</b> (as defined by practice)	V		
Closing Procedures	<b>Practice Walkthrough</b> <ol style="list-style-type: none"> <li>Open all exam room doors and wipe down patient care equipment in rooms.</li> <li>Wipe down all blood pressure stations (e.g., BP cuffs, chair, armrest, control panel, scale) with UCSF-approved disinfectant and allow to dwell (i.e., remain wet) per container instructions.</li> <li>Transport instruments/scopes for reprocessing to SPD or endoscopy, as appropriate.</li> <li>Verify that all endocavity probes are high-level disinfected and stored properly, if applicable.</li> <li>Close and lock all cabinets and rooms, as appropriate.</li> <li>Notify providers that you are leaving. Provide name of clinical staff available to assist them if needed.</li> <li>If you are the last clinical staff member in clinic:                             <ol style="list-style-type: none"> <li>Notify provider(s) that you are the last clinical staff member and that you are leaving.</li> <li>Notify provider(s) of any patients waiting to be seen in exam or procedural rooms.</li> <li>Remind provider(s) that lab specimens generated from remaining patient visits must be taken to the lab by provider or patient.</li> <li>Remind provider(s) that reusable instruments generated from remaining patient visits must be taken to soiled utility area and pretreated per policy (provide disposable instruments if possible).</li> <li>Inform remaining patient(s) that you are leaving but provider is aware they're waiting to be seen.</li> </ol> </li> </ol>	V,O,RD		

