UCSF Health

- o This scope of practice grid is based on related State of California Statutes and Regulations.
- o Job duties cannot exceed California statutes and regulations, but can be limited by UCSF policy.
- o Applies to most ambulatory practices, specialty specific items are not completely addressed.
- o This list is a guide for ambulatory practices and is not inclusive of all tasks and procedures.
- o Staff must demonstrate consistent performance in order to continue performing each task/procedure.
- o Scope of Practice categories include (ctrl + click on each category below to advance to that section):
    - ▪ Tasks/Procedures
    - ▪ Dressings, Wound Care, and Assisting with Procedures
    - ▪ Medication Management
    - ▪ IV Therapy and Blood Withdrawal
    - ▪ Documentation and Message Management
    - ▪ APeX and Administrative Tasks

RN	LVN	MA Tech	Task/Procedure	COMPETENCY AVAILABLE?
✓	✗	✗	**Assessment**, patient, perform with independent clinical judgment and development of nursing diagnoses and a plan of care	N
✓	✓	✓	**Auditory Screening Test,** (Adult & Pediatrics), perform	Y
✓	✓	✓	**Automated External Defibrillator (AED),** check, initiate care, defibrillate as guided by AED (Requires current BLS certification & successful completion of training on new hire)	Y
✓	✗	✗	**Automated External Defibrillator (AED),** use function of Zoll R-Series Defibrillator	Y
✓	✓	✓	**Bilirubinometer**, perform	Y
✓	✓	✓	**Bladder Scan**, perform	Y
✓	✓	✗	**Catheter Insertion/Removal/Care,** (urinary, straight or indwelling), perform (LVNs eligible only with consistent performance)	Y
✓	✓	✓	**Clinic Open/Close/Room Turnover,** perform	Y
✓	✓	✓	**Code cart,** check, order supplies and test Zoll defibrillator	Y
✓	✓	✓	**Compresses**, therapeutic hot/cold application	N
✓	✓	✓	**Ear Irrigation,** perform (requires pre & post assessment by RN or Provider)	Y
✓	✓	✓	**EKG,** perform	Y
✓	✓	✗	**Enema,** administer	N
✓	✓	✓	**Fetal Monitoring,** hook-up	N
✓	✗	✗	**Fetal Monitoring**, testing	N
✓	✗	✗	**Foot Examination,** assessment with neurological check and use of monofilament	N
✓	✓	✓	**Foot Screen,** perform (with monofilament)	Y

RN	LVN	MA Tech	Task/Procedure	COMPETENCY AVAILABLE?
✅	✅	✅	**High Level Disinfection (HLD),** perform (for approved practices, Trophon only) **(requires annual competency)**	Y
✅	✅	✅	**Isolation Precautions,** implement (see Isolation Table for reference)	N
✅	❌	❌	**Laser Skin,** treatment (for approved practices only)	Y
✅	✅	✅	**Liquid Nitrogen,** safe handling	Y
❌	❌	❌	**Orthopedic Appliances,** apply orthopedic appliances; select/adjust/instruct on crutch use (Orthopedic Institute **Athletic Trainers** may assist with crutch use but all other orthopedic needs are addressed by the UCSF Campus Orthotics and Prosthesis team.)	N
❌	❌	✅	**Orthopedic Appliances,** remove casts, splints, and other external devices (Orthopedic Institute **Athletic Trainers and Ortho Techs** may remove casts and splints. All other external devices must be removed by a provider.)	N
✅	✅	✅	**Oxygen,** apply via mask/nasal cannula; switch from home oxygen to practice-supplied oxygen (requires a provider order, see O2 algorithm for reference)	Y
✅	❌	❌	**Patient Education/Teaching**, plan, develop; assess/identify learning needs and document in APeX	N
✅	✅	✅	**Patient Instruction**, review/reinforce pre-printed and approved instruction/information (MA/Tech/LVN only per provider direction with prewritten information that is read and given to the patient)	N
✅	✅	✅	**Peak Flow Meter,** perform	Y
✅	✅	✅	**Point of Care Testing (POCT)**, perform department-approved "Point of Care" waived tests and quality control **(requires annual competency)**	Y
✅	✅	✅	**Point of Care Testing (POCT)**, order and perform approved tests per protocol cosign required (*refer to Non-Provider Protocol list on Nursing Manuals for approved tests)	Y
✅	✅	✅	**Safe Patient Handling,** perform **(requires annual module and hands-on training)**	Y
✅	✅	✅	**Soiled Instrument Handling,** perform (for approved practices) **(requires annual competency)**	Y
✅	❌	❌	**Specimen Collection (nasal wash, sputum induction, wound culture, nasopharyngeal/mid-turbinate/oropharyngeal swab),** perform and label	Y
✅	✅	✅	**Specimen Collection (noninvasive),** provide specimen container to patient/provider (for urine, semen, or stool) or perform swab (anterior nares) and label	Y
✅	✅	✅	**Thermometer (digital),** read/program for temperature monitoring	Y
✅	✅	❌	**Urodynamic Profile Study (adult),** perform	Y
✅	❌	❌	**Urodynamic Profile Study (pediatric),** perform	Y
✅	✅	✅	**Vision Test (Snellen & Photoscreening)**, perform (adults and pediatrics)	Y
✅	✅	✅	**Vitals,** perform	Y

RN	LVN	MA Tech	Task/Procedure	COMPETENCY AVAILABLE?
✓	✓	✗	**Void (active trial),** perform	Y
✓	✗	✗	**Voiding (cystourethrogram),** perform	Y

RN	LVN	MA Tech	Dressings, Wound Care, and Assisting with Procedures	COMPETENCY AVAILABLE?
✓	✓	✓	**Circumcision (infant),** setup and assist	Y
✓	✗	✗	**Drain removal,** perform	Y
✓	✓	✗	**Dressings/bandages (simple, sterile AND nonsterile),** apply, clean, or remove for closed surgical incisions or stage 1 and 2 wounds. (Requires pre- & post- assessment by RN or Provider for LVN)	N
✓	✗	✗	**Dressings (complex),** apply, clean (with solutions or medication) pack and/or remove for open surgical incisions or stage 3+ and unstageable wound, including debridement.	N
✓	✓	✗	**Dressings (compression, vascular compression),** apply (e.g. Unna Boot) (requires pre & post assessment by RN or Provider for LVN)	N
✓	✓	✓	**Procedures,** assist and prepare sterile field, prep site (skin antisepsis), position and drape patient, collect specimen from provider (excludes cutting, clamping, suturing incision or dissecting tissue)	Y
✓	✓	✓	**Suture and Staples,** removal and provide written post-removal care instructions (Requires pre- & post- assessment by RN or Provider) (MAs eligible only with consistent performance)	Y

RN	LVN	MA Tech	Medication Management	COMPETENCY AVAILABLE?
✓	✗	✗	**Allergy (oral food challenges),** perform	N
✓	✓	✗	**Allergy (skin test),** perform	Y
✓	✓	✓ *	**Allergy Documentation,** update/verify allergies, "Mark as Reviewed" (allergies must be reviewed prior to administration of medications) *MAs must receive additional training specific for medication administration	N
✓	✗	✗	**Bladder Irrigation & Instillation,** (urinary, chemotherapy), perform	Y
✓	✓	✗	**Bladder Irrigation & Instillation,** (urinary, non-chemotherapy), perform	Y
✓	✓	✗	**Controlled Substances,** administer, count, witness wasting, sign out	N
✓	✗	✗	**Hazardous Risk and Hazardous: Limited Risk Medications,** administer	Y
✓	✗	✗	**High Risk Medications,** administer	Y

RN	LVN	MA Tech	Medication Management	COMPETENCY AVAILABLE?
✓	✓	✗	**Medication Administration (inhalation)**	N
✓	✓	✓*	**Medication Administration (intradermal, subcutaneous, intramuscular, oral, topical)** *MA/Techs must have additional training and validation beyond the competency.	Y
✓	✓	✗	**Medication Administration (vaginal, rectal)**	N
✓	✗	✗	**Medication Reconciliation,** perform	N
✓	✗	✗	**Medication Refill,** per protocol cosign required (for approved practices)	N
✓	✓	✓	**Medication Refill Requests** o Review and forward requests to provider for signature o Refuse requests if agreed upon with provider or refills still available at pharmacy and notify patient o Fax refill request for existing medications; transfer request into APeX for electronic review	N
✓	✓	✓	**Medication Review,** perform and discontinue per guidelines/scope	N
✓	✗	✗	**Medication Verbal and Telephone Orders (from a provider),** verbal/telephone orders must be only for urgent & emergent issues per UCSF policy **(NOTE:** Verbal/telephone orders are 'active' orders)	
✓	✓	✓	**Prior Authorization (electronic),** for medication prescription/refills	N
✓	✗	✗	**Procedural Sedation,** administer and monitor	Nursing Manuals
✓	✓	✓*	**Pyxis/Medication Room,** access *MAs must complete the "Medications and Auxiliary Staff" LMS module to access, transport, or stock medications	
✓	✓	✗	**Reproductive Toxin Medications,** administer	Y
✓	✓	✓*	**TB Skin Test (intradermal),** administer and measure results (no interpretation) *MA/Techs must have additional training and validation beyond the competency.	Y
✓	✓	✗	**TB Skin Test (intradermal),** interpret results as positive or negative and document results	Y

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RN	LVN	MA Tech	IV Therapy and Blood Withdrawal	COMPETENCY AVAILABLE?
✓	✗	✗	**Blood and Blood Products,** administer and monitor	Nursing Manuals
✓	✗	✗	**Blood withdrawal (central venous access)**	Nursing Manuals
✓	✓	✓	**Blood withdrawal (capillary collection including Heel Stick)** (Only with certificate of completion of CA CPT1 for HA/MA's and Blood Withdrawal certificate from BVNPT for LVNs)	Y

RN	LVN	MA Tech	IV Therapy and Blood Withdrawal	COMPETENCY AVAILABLE?
✓	✓	✓	**Blood withdrawal (venipuncture)** (Only with certificate of completion of CA CPT1 for HA/MAs and Blood Withdrawal certificate from BVNPT for LVNs)	Y
✓	✗	✗	**Central Line/PICC,** catheter care, repair and dressing change, or remove (with specific training)	Nursing Manuals
✓	✗	✗	**Chemotherapy,** administer IV, IM (with ONS/APHON chemotherapy provider card)	Nursing Manuals
✓	✗	✗	**IV,** administer fluids with or without additives, regulate flow, flush peripheral devices, monitor peripheral site and systemic effects of IV therapy	Nursing Manuals
✓	✗	✗	**IV,** administer medications	Nursing Manuals
✓	✗	✗	**IV,** start and disconnect peripheral	Nursing Manuals
✓	✗	✗	**Phlebotomy (therapeutic),** perform	Nursing Manuals

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RN	LVN	MA Tech	Non-Clinical	Documentation and Message Management	COMPETENCY AVAILABLE?
✓	✗	✗	✗	**Abstraction,** perform	N
✓	✗	✗	✗	**Care Plan (nursing and multidisciplinary),** based on assessment, develop/initiate/coordinate	N
✓	✓	✓	✓	**Documentation/Data Collection (e.g., telephone encounters),** collect data from the patient, leave secure messages for the patient	N
✓	✓	✓	✗	**Documentation/Data Collection (while rooming patient),** click on button "Mark as Reviewed" for each applicable section including chief complaint, falls, learning needs, values/beliefs, allergies, medication review, medical/surgical history, family history, social history, pain screening, tobacco use, PHQ	N
✓	✗	✗	✗	**Health status,** assess and evaluate	N
✓	✓	✓	✗	**Healthcare maintenance (HCM),** collect and document information for providers in their HCM, relaying what patient is due for	N
✓	✓	✓	✗	**Immunization Record,** transcribe results from outside facilities into APeX record	N
✓	✓	✓	✓	**Interpreter Use,** document	N
✓	✓	✓	✓	**MyChart Messages** • **Nonclinical messages,** review and address questions/requests • **Clinical messages,** forward to provider if unable to triage due to scope or unable to address question/concern	N
✓	✓	✓	✓	**Pharmacy,** verify preferred pharmacy and pharmacy benefits	N
✓	✓	✓	✗	**Questionnaires,** enter clinic-administered questionnaire responses into APeX	N

RN	LVN	MA Tech	Non-Clinical	Documentation and Message Management	COMPETENCY AVAILABLE?
✓	✗	✗	✗	**Test Results,** attach to provider In-Basket for result review	N
✓	✓	✓	✗	**Test Results** ○ Call patient ○ Relay information as instructed by provider (All test results are interpreted by a provider prior to relay of the results) ○ Release results to MyChart with provider instructions	N
✓	✓	✗	✗	**Title "Nurse",** use	N
✓	✗	✗	✗	**Triage/advice (RN),** provide (only with approved protocols via telephone or MyChart message and using APeX SmartPhrases)	Y
✓	✗	✗	✗	**Verbal and Telephone Orders (from a provider),** verbal orders must be only for urgent & emergent issues per UCSF policy	N

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RN	LVN	MA Tech	Non-Clinical	APeX & Administrative Tasks	COMPETENCY AVAILABLE?
✓	✓	✓	✓	**Care Everywhere,** activate	N
✓	✓	✓	✓	**Care Everywhere,** reconcile medication records from outside institutions	N
✓	✓	✓	✓	**Care Team,** update	N
✓	✓	✓	✓	**Prior Authorization (electronic),** non-medication orders	N
✓	✓	✓	✓	**Appointments,** schedule	N
✓	✓	✓	✓	**Telephone Calls,** create encounter from CRM message	N
✓	✓	✓	✓	**Telephone Contacts Section,** document incoming/outgoing phone calls in encounter	N

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RNs, LVNs, MA/Techs with questions regarding a specific task or procedure should discuss concern with Nurse Manager or Clinical Lead. If Nurse Manager or Clinical Lead is not available, contact Practice Manager or Administrative Director.

Questions: Email the Ambulatory Clinical Resource Team (ACRT); ACRT@ucsf.edu

RESOURCES:
Apex Knowledge Bank
Ambulatory Website
Isolation Table
Nursing Manuals
Non-Provider Protocols
Verbal and Telephone Orders