Medical training guide

This is is copied from the document "FINAL MED TRAINING GUIDE".

Provider preferences and limitations

We are working very hard to make sure patients follow-up with the same provider they are established with or continue care with. If a patient is being scheduled for a follow-up, please make sure they are following up with their PCP. Acute visits (sick, sore throat, cough, uti, etc) anything that would generally take 15 minutes or less can be scheduled with any provider or a same-day appointment even if they are not established with Spectra. Follow-ups from that visit need to be with that same provider.

General things to know/share with patients

- Controlled substances and new patients:
    - Past records will need to be faxed – filed with us **before** any prescription will be given. Please do your best to advise patients that they may not get refills on these medications on the day of their first visit.
- ADHD:
    - if there are no records, may require psychological testing to confirm diagnosis. (most especially with adult ADHD) before any medications are prescribed.
- Hip injections:
    - providers will see the patient to evaluate but may be referred out.
    - - Spectra does **not** have equipment to do colonoscopy, ultrasound, MRI, or CAT scan. These things may be referred out.
    - - Spectra can do x-rays.

Medical clinic addresses and hours of operation

Grand Forks medical clinic
212 South 4th Street, Suite 301
Grand Forks, ND 58201

- Phone number: (701) 757-2100
- Fax number: (701) 757-0305
- Hours of operation:

Day	Start	End
Monday	7:30 AM	5:00 PM
Tuesday	7:30 AM	5:00 PM
Wednesday	7:30 AM	5:00 PM
Thursday	7:30 AM	5:00 PM
Friday	7:30 AM	5:00 PM

Larimore clinic
607 Towner Avenue
Larimore, ND 58251

- Phone number: (701) 343-6418
  - **Note from IT**: This number reaches the same menu as the Grand Forks line, but it's worth sharing with Larimore patients because it can help them avoid long-distance charges.
- Fax number: (701) 343-2937
- Hours of operation:

Day	Start	End
Monday	7:30 AM	5:00 PM
Tuesday	7:30 AM	5:30 PM
Wednesday	7:30 AM	5:00 PM
Thursday	7:30 AM	5:00 PM
Friday	Closed	Closed

Walk-in clinic hours (Larimore only):

Day	Walk-ins begin	Walk-ins end
Tuesday	5:00 PM	5:30 PM

Provider availability and preferences

Provider availability:

Provider	Location(s)	Days	Notes
Eric Lunn	Grand Forks **and** Larimore	GF: Mon, Tue, Wed Larimore: Wed	

Provider	Location(s)	Days	Notes
Lisa Bernhardt	Grand Forks **only**	-	
Gail Halversion	Grand Forks **only**	Tue, Thu	
Chris Harsell	Grand Forks **only**	Mon, Wed, every 3rd Fri	
David Sundberg	Grand Forks **only**	All except Tue	Does not work on Tuesdays
Alicia Mack	Grand Forks **only**	-	
Kristen Young	Larimore **only**	Mon - Thu	

Teams visits:

- Only **2 visits** allowed in the **AM**.
- Only **2 visits** allowed in the **PM**.
- Additional visits require **nursing staff approval**.

Provider preferences:

Provider	Title	Patient age range	Special services / Notes
Eric Lunn	Pediatrician	Newborn - 21 years	Sports physicals
Lisa Bernhardt	Adult Gero Nurse Practitioner	13 years and older	Medication Assisted Treatment (MAT)
Gail Halverson	Women's Health Nurse Practitioner	Varies	Well-woman exams, family planning, STI checks (all genders), Nexplanon removals, acute care
Chris Harsell	Adult Nurse Practitioner	13 years and older	MAT, DOT physicals **NO** joint injections or OB care
David Sundberg	Family Nurse Practitioner	18+ primary care; 1-18 acute only	MAT **NO** joint injections or OB care
Alicia Mack	Family Nurse Practitioner	All ages	Well-child care, sports physicals, DOT physicals, MAT **NO** joint injections or OB care
Kristen Young	Family Nurse Practitioner	All ages	Well-child care, sports physicals, MAT **NO** joint injections or OB care

Medical appointment types

Establish New Patient:

- **Duration:** 60 minutes for all providers, **except Christine Harsell (30 minutes)**
- **Purpose:** For patients establishing care at Spectra, especially for medication management (mental health or chronic illness)
- **Follow-up:** If the patient continues care, they will be assigned a primary provider
- **Records:** Prior medical records must be faxed or sent if the patient was treated elsewhere

MAT Intake (Medication Assisted Treatment):

- **Initial Appointments:** Schedule with **Chris or Kristen**
- **Use:** For new patients starting MAT
- **Follow-up Appointments:** Use the "Follow-up MAT" type; can be scheduled with any provider **except Dr. Lunn and Gail**

- **PCP Preference:** If the patient has a Spectra PCP, schedule with them when possible
- **Frequency:** Typically every 28–30 days, depending on treatment plan
- **Labs:** After check-in, send patient for **UA, mouth swab, and/or blood draw**

Follow-Up:

- **Duration:** 30 minutes
- **Use:** For returning patients, typically requested by their provider

Office Visit:

- **Duration:** 30 minutes
- **Use:** For acute issues, new concerns, or patients not previously seen at Spectra

Physicals:

- **Duration:** 30 minutes
- **Types & Notes:**
    - **Sports Physical:** Add "sports" in appointment notes
    - **DOT Physical:** Add "DOT" in appointment notes
    - **Yearly Physical:** Add "yearly" in appointment notes
    - **Women's Physical:** Add "women's" in appointment notes (e.g., breast exam, pap)

Post-Hospital / Emergency Room Follow-Up:

- **Duration:** 30 minutes
- **Eligibility:** For **established patients only**, unless approved by Charge Nurse
- **Timing:** Should be scheduled within **7 days** of hospital or ER discharge
- **Provider:** Schedule with the patient's PCP

New American:

- **Use:** For refugee patients referred by **Global Friends**
- **Initial Visit:**
    - **Provider:** 60 minutes
    - **Lab/X-ray/Nurse:** 30 minutes
- **Follow-Up:** Use "New American" appointment type for 30-day follow-up
- **Ongoing Care:** Use regular follow-up appointment type after initial and 30-day visits

Nurse visits

Medical home visits

- Care coordination
- Always with a RN.

Standard nurse visit

- 30-minute appointment scheduled as a *Nurse Visit*
- Any vaccine needed. If more concerns, they will need a provider visit. If behind on vaccines,

they should be seen with the correct age-appropriate provider.

- Depo shot: If they are still in their 3-month window. If not, schedule with Gail.
- B-12 injection
- Stitch removal – be sure to ask where stitches are located.
- Blood pressure check – if approved by nursing if it's a walk-in.
- Tb skin test.
- New American initial visit: 60-minutes
- TTS- smoking sensation – with certain nurses.

Lab:

- Schedule as a Walk-in Shlab
- UA
- INR
- MAT: UA/ mouth swab/ blood draw before provider visit (this does not need to be scheduled; we should automatically send them back to lab.)
- Outside lab orders need to be faxed to Spectra Health before scheduling or can bring paper orders with to appointment.

X-Ray:

- New American initial visit (if needed) 30-minutes.
- Outside x-ray orders need to be faxed to Spectra before scheduling. Or can bring paper orders with to appointment.

Occ. Health Appointments

- Schedule visit type would be *NEW EMP SHOCCH*.
- These types of visits would be for new hires. There should be blocks in the Epic Snapboard to schedule appropriately. Can only be scheduled in those blocks provided.
- Unless approved by nursing.
- When flu season approaches, all employees are required to receive vaccines. This will be scheduled DIFFERENTLY – as a nurse visit and appointment notes would say "**Employee Vaccine**"

Scheduling WSI Visits

See also: How to create WSI

1. Schedule to visit as an *Office Visit*.
2. Be sure to add a new guarantor to the visit registration and attach it by selecting **+ Add New Guarantor**.
3. Add Date of Injury.

Phone etiquette

When answering the phones you <u>should</u> answer as:

- "Thank you for calling Spectra Health. This is (your name) how may I help you?
- "Spectra Health this is (your name) how may I help you?"

<u>DO NOT</u> answer the phone as:

- "How can I help you?"
- This is (your name)
- "Hello"

When someone internal is calling ex. (another PSR, Nursing, HR) always answer the same way you would as an external call. With the new phone system, transfers can pop up to look like it's another employee calling.

Calling patients to schedule/reschedule, returning voicemail, confirming appointments or any other reason:

- Once the patient answers the call, you must state who you are, where you are calling from, and verify at least **two** pieces of information such as Last Name/ DOB.

- Example: "Hello, this is (your name) with Spectra Health. I was calling to return a voicemail I received regarding an appointment."
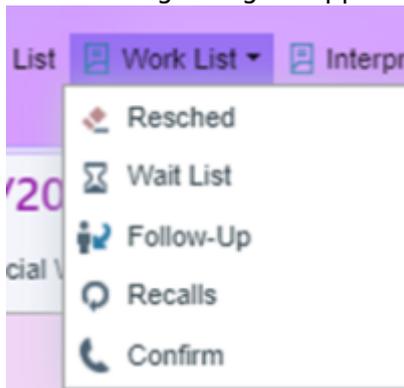
Once a patient answers a call, <u>DO NOT</u> greet them by saying:

- "We need to reschedule your appointment."
- "Hello, I need to confirm an appointment."

How to make confirmation calls

1. Click on the *Work List* at the top of Epic.
2. Click *Confirm* icon.
3. On the left side of the pop-up box, you will want to select the *SHGF Primary Care* option.
4. Department list should be: *SHGF Primary Care*, *SHGF Chiropractic*, and *SHGF Lab*.
5. Make sure you select *Date Range Box* and click *RUN*.
6. A list of the upcoming appointments should populate.
7. Click on *Provider/resource* twice. This will help put the time of appointments in order by provider.
8. If a patient confirms their appointment *right-click in correct patient box* and click *confirm*.
9. If a patient does NOT answer the phone, *right-click in the correct patient box*, click *New Call* under Contact Info. Click *Self*. Under Follow-up *select the correct outcome of the call made*.

10. When making a confirmation call, please remember to tell patients that their appointment time is 15 minutes before the scheduled appointment time. For example, if the appointment is at

3:00pm. We should tell them their appointment is at 2:45pm.

Confirmation call script

Answered phone:

- Hello, this is (your name) calling from Spectra Health. May I ask who I am speaking with? (patient answer) Great, can you just confirm your last name and date of birth for me please. I am calling to confirm your appointment with (provider) on (date and time)

Voicemail for Adults (18+ years old):

- Hello, this is (your name) calling from Spectra Health. I was calling as a reminder for (patient first name only) he/she has an appointment for (date and time) with (provider) please give us a call back at 701-757-2100 if you have any questions or need to reschedule. Have a great day, Thank you.

Voicemail for Minors:

- Hello, this is (your name) calling from Spectra Health. I am looking for the parent or guardian of (minor first name) he/she has an appointment for (date and time) with (provider) please give us a call back at 701-757-2100 if you have any questions or need to reschedule. Have a great day, Thank you.

Creating a guarantor

Note: when updating addresses in the demographics portion of the chart, edit the guarantor and select "pull info" to update the contact information. This will help reduce returned mail received by the clinic.

1. From the patient chart, open registration and select "**Pat Guar and Cvg**"
2. From "**add guarantor**" you can search for an already existing guarantor (parent of minors who are Spectra patients or spouse.)
3. If a guarantor account is in our system. Highlight the guarantor and click "**select**"
    1. Do not use **create new** as it will create a new account in the system.
4. If no guarantor is appropriate, select **add guarantor** and select either **self** or the guarantor's relationship to the patient.

5. Enter the guarantor demographics to the best of your ability.
    1. If a patient is over the age of 18, they are their own guarantor even if they are on parents' insurance.
    2. If the patient is married, inquire if they or their spouse has the financial responsibility

party. This will often be who the subscriber of the insurance policy.
   3. If the patient is under 18 years of age, a parent or guardian is the financial responsible party.
   4. If the patient is under 18 years of age and in foster care or in state custody, they are listed as their own guarantor regardless of age.
6. Enter the insurance information as needed. All patients require a guarantor to be checked in for appointments regardless of insurance status.

Adding insurance

See similar information here: Insurance and Registration.

Note: you typically do not need a member ID for ND MA to send a query. The system will pull it unless its ND Medical Expansion.

1. From the patient's chart, select **+ add coverage** on the right-hand side of *Encounter Guarantor and Coverages*.


2. From there, you will enter the patients Insurance Company and select the correct Policy and then select **Accept**.
   1. Example (ND BCBS, ND MA, MN BCBS, UNITED HEALTHCARE, AETNA)
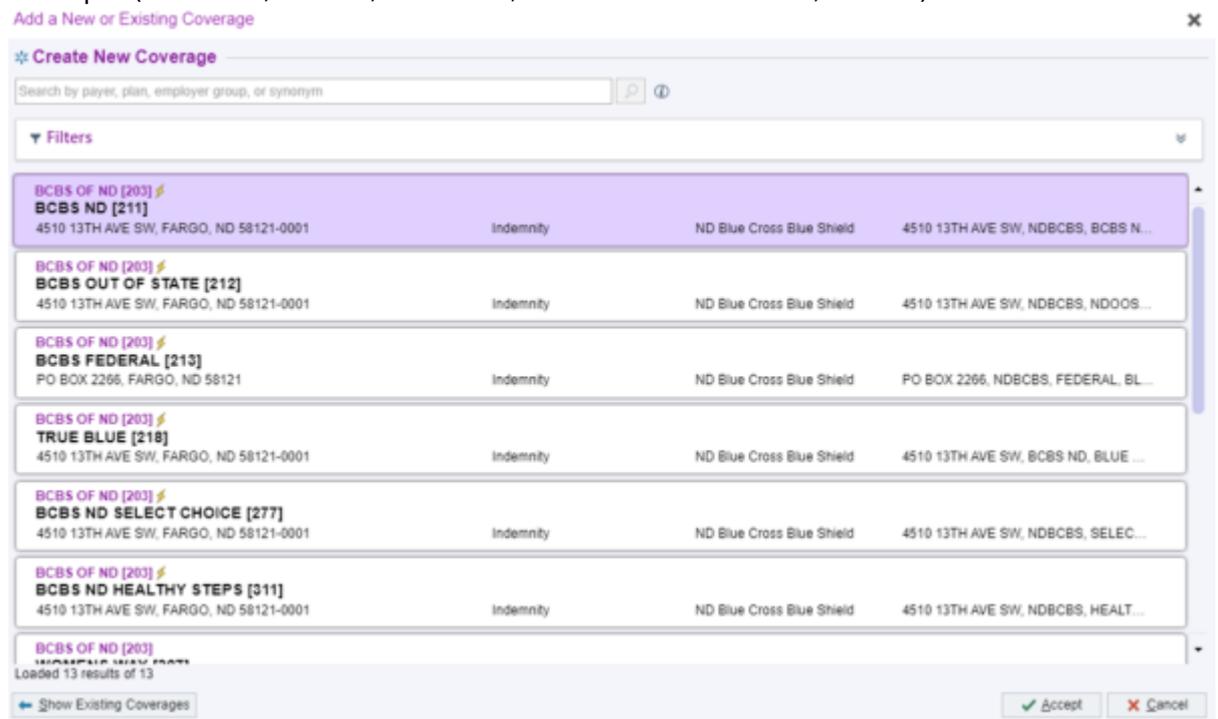
3. You will then select the *patients name*, under who is the subscriber for this coverage.
4. Enter in the Member ID Number and select "*Send Query*"
5. Make sure to attach it to the visit and attach the Insurance Card after scanning it into documents. It should give you a warning notice to attach it.

How to count your cash drawer
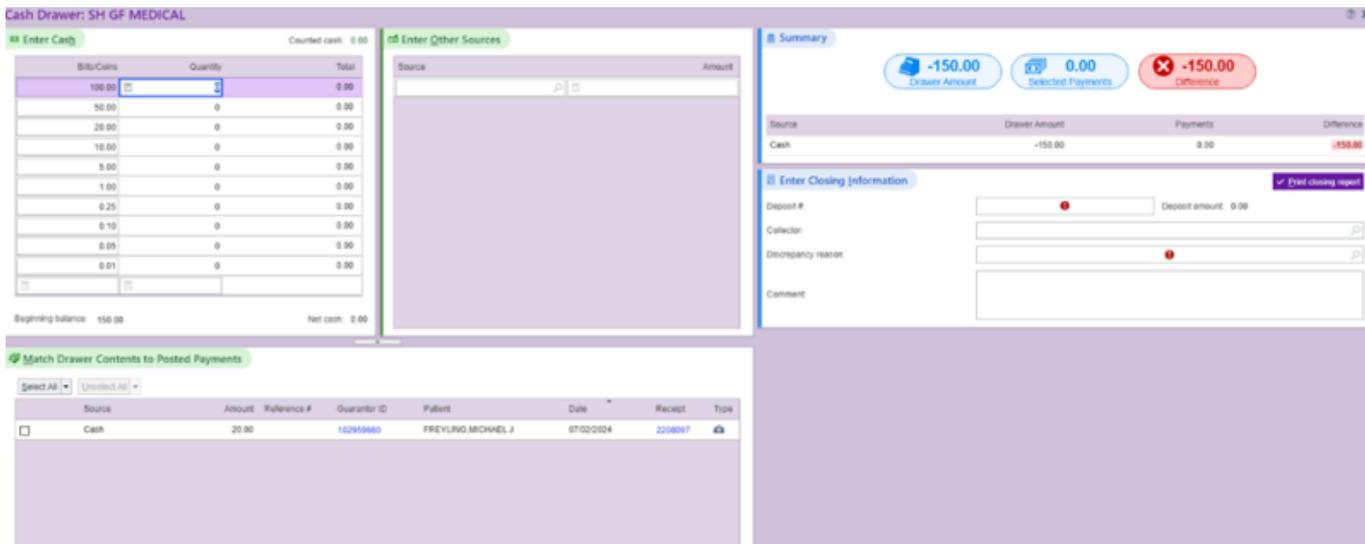
1. Select cash drawer on the top of the epic task bar.
2. Count your cash drawer, place the number of bills in correct bill slot (not the dollar amount)
3. Select any card/check payments you've taken located on the bottom of your screen (Match Drawer Contents to Posted Payments)
4. Enter the source and amount that was taken under (Enter Other Sources) on the right-hand side.
5. Make sure your drawer is even and green.
6. Your deposit number will be the date you closed the till.
7. The Collector is yourself.
8. Select *Deposit*.
9. Take any cash/check payment and place in envelope. The Envelope, receipts, and end of day closing report get paper-clipped together and put in the green folder with Kelsey/Cole's name.
10. After closing out the till. Make sure your balance is still a $150.00 left.

If you have any questions, reach out to Tanner Miller, Kelsey Gunderson or Cole Wandschneider.

Medical clinic checklist

Daily tasks:

Morning:

- Turn on all lights, login to phone and computers.
- Count the cash drawer – you should have $150.00
- Check voicemails.
- Open gate. Should be opened by 7:30am
- Start confirmation calls by 9am.
- Chart prep for following day.

Afternoon:

- Check and return voicemails for mid-day missed calls.

Closing:

- Close cash drawer.
- Check and return voicemails.
- Wipe down lobby chairs, tables, front desk, elevator, door handles and your own workstation with Clorox wipes and spray.
- Close gate.
- Shut lights off.

Weekly tasks:

- No show lists.
- Medical clinic work-queue.
- Establish letters.
- Reschedules.
- Wait-list.

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