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	5:00 PM
Wednesday	7:30 AM	5:00 PM
Thursday	7:30 AM	5:00 PM
Friday	Closed	Closed

Provider availability and preferences

Provider availability:

Provider	Location(s)	Days	Notes
Eric Lunn	Grand Forks **and** Larimore	GF: Mon, Tue, Thurs Larimore: Wed	
Lisa Bernhardt	Grand Forks **only**	Tues, Wed, Fri	
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**	Only Tuesdays	

Provider	Location(s)	Days	Notes
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

Appointment Type	Duration	Purpose / Use	Follow-Up / Notes
Establish New Patient	60 min	For patients establishing care, especially for medication management	Assign PCP if continuing care; prior records required
MAT Intake	Varies	For new patients starting MAT	Schedule with Chris or Kristen; follow-up every 28–30 days; labs after check-in; avoid Dr. Lunn and Gail
Follow-Up	30 min	For returning patients	Typically requested by provider
Office Visit	30 min	For acute issues or new concerns	For patients not previously seen at Spectra
Physicals	30 min	Routine physicals	Add type in notes: sports, DOT, yearly, women’s
Post-Hospital / ER Follow-Up	30 min	For established patients post-discharge	Schedule within 7 days; PCP only; Charge Nurse approval if new
New American	60 min (provider), 30 min (labs)	For refugee patients referred by Global Friends	Use “New American” type for 30-day follow-up; regular follow-up after that

Nurse visits

Visit Type	Duration	Details	Notes
Medical Home Visits		Care coordination	Always with a RN
Standard Nurse Visit	30 min	Any vaccine needed	Provider visit if more concerns; correct age-appropriate provider if behind on vaccines
Depo Shot			Schedule with Gail if outside 3-month window
B-12 Injection			
Stitch Removal			Ask where stitches are located
Blood Pressure Check			Approved by nursing if walk-in
Tb Skin Test			
New American Initial Visit	60 min		
TTS - Smoking Cessation			With certain nurses
Lab			Schedule as Walk-in Shlab
UA			
INR			
MAT			UA/mouth swab/blood draw before provider visit; automatically send to lab
Outside Lab Orders			Fax to Spectra Health before scheduling or bring paper orders to appointment
X-Ray			
New American Initial Visit	30 min		If needed
Outside X-Ray Orders			Fax to Spectra before scheduling or bring paper orders to appointment

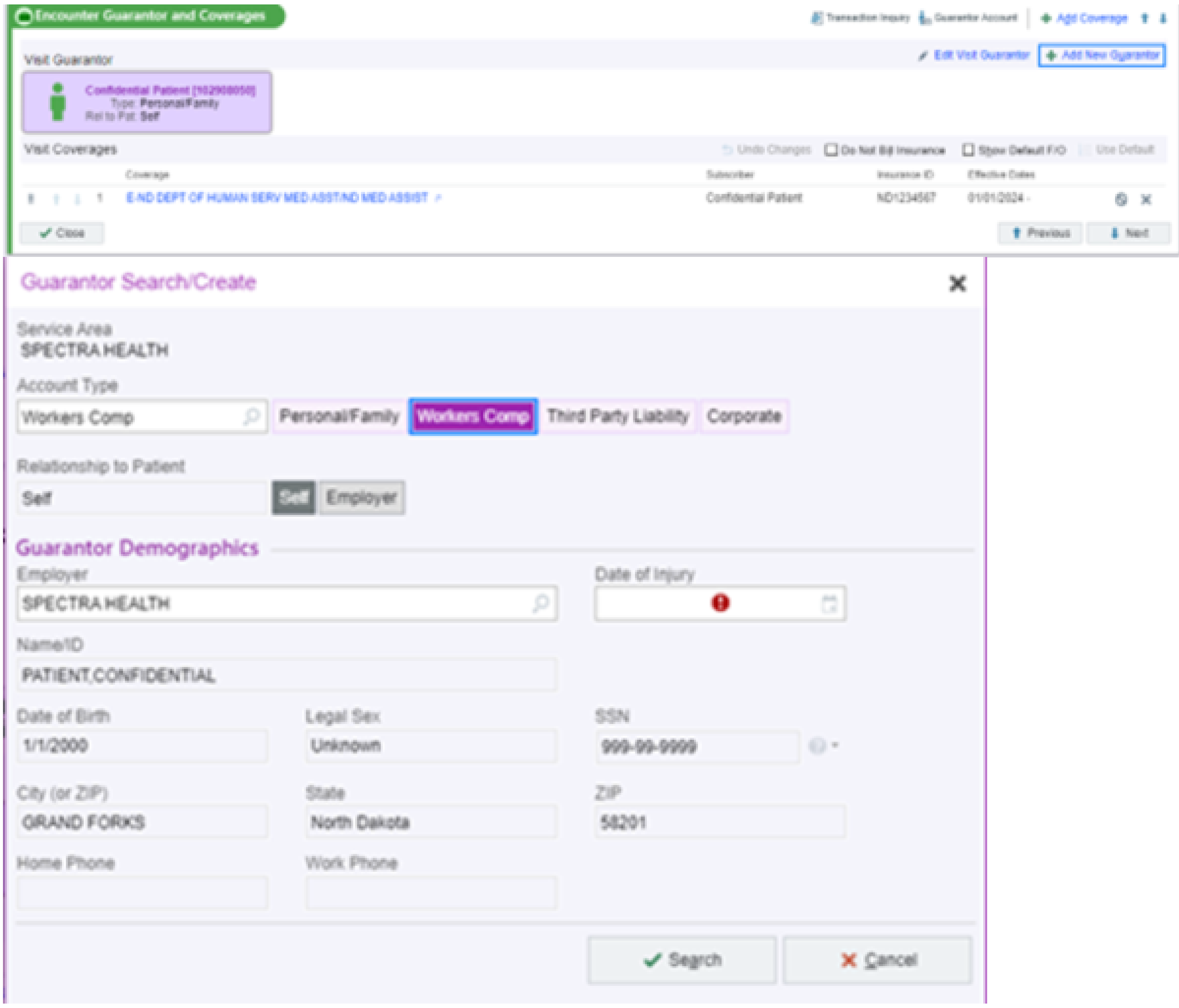
Occ. Health Appointments

- 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:

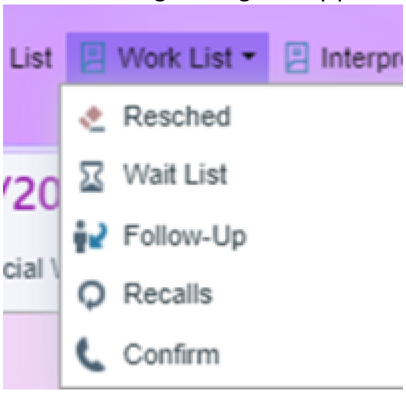
- “How can I help you?”
- This is (your name)
- “Hello”

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."

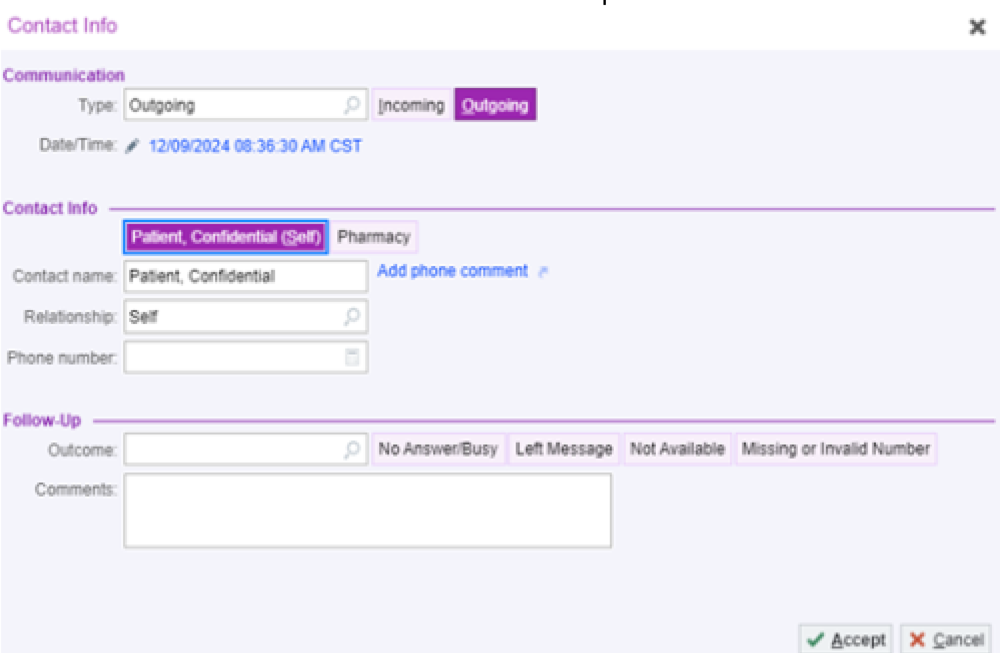


Once a patient answers a call, <u>DO NOT</u> greet them by saying:

- "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):

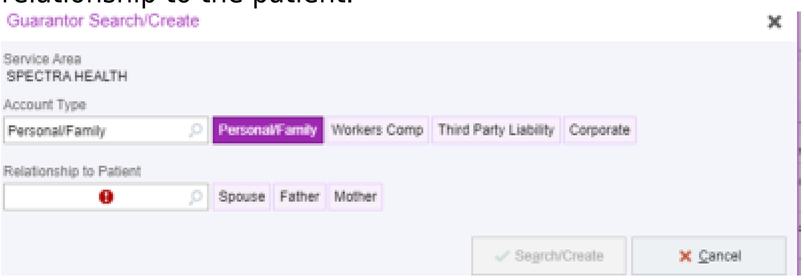
- Hello, this is (your name) calling from Spectra Health. I was calling as a reminder for (patient first name only) he/she has an appointment for (date and time) with (provider) please give us a call back at 701-757-2100 if you have any questions or need to reschedule. Have a great day, Thank you.

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.


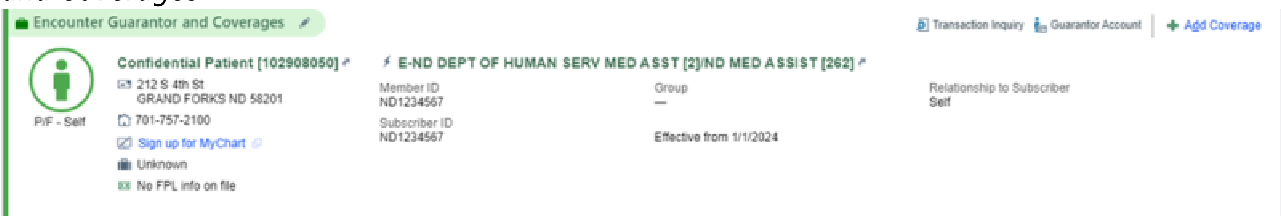
5. Enter the guarantor demographics to the best of your ability.
    1. If a patient is over the age of 18, they are their own guarantor even if they are on parents’ insurance.
    2. If the patient is married, inquire if they or their spouse has the financial responsibility party. This will often be who the subscriber of the insurance policy.

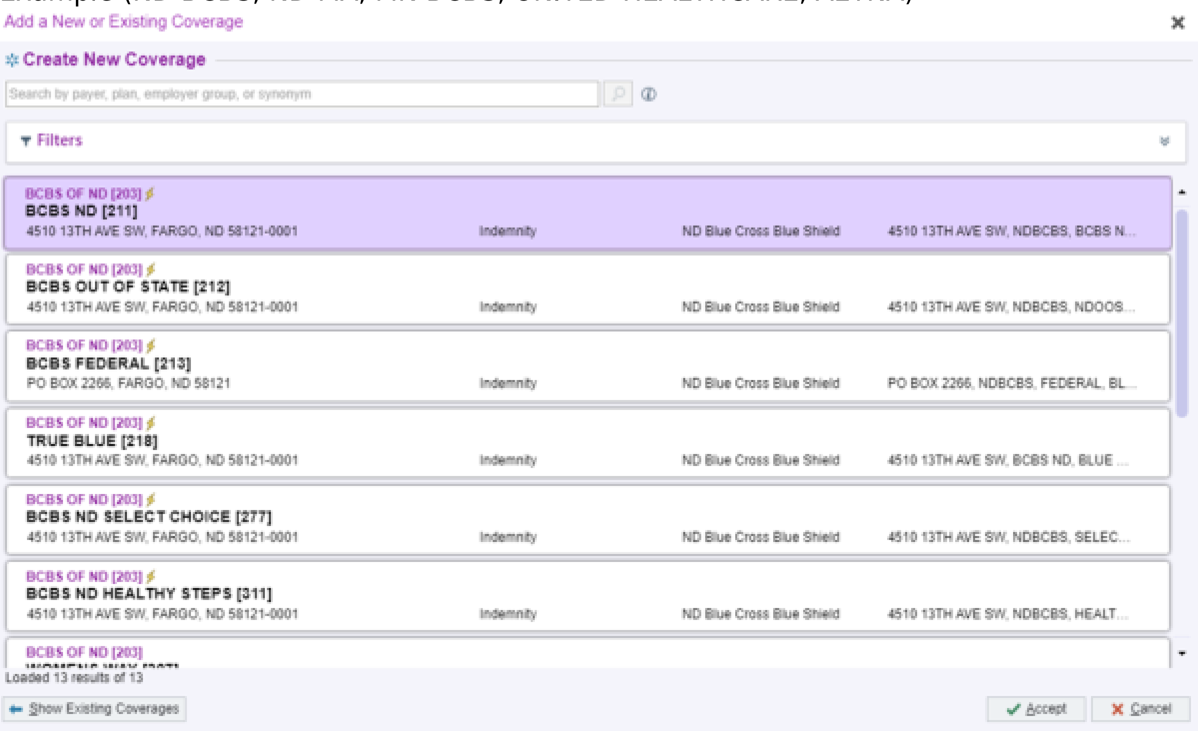
   3. If the patient is under 18 years of age, a parent or guardian is the financial responsible party.
   4. If the patient is under 18 years of age and in foster care or in state custody, they are listed as their own guarantor regardless of age.
6. Enter the insurance information as needed. All patients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

Adding insurance

See similar information here: Insurance and Registration.

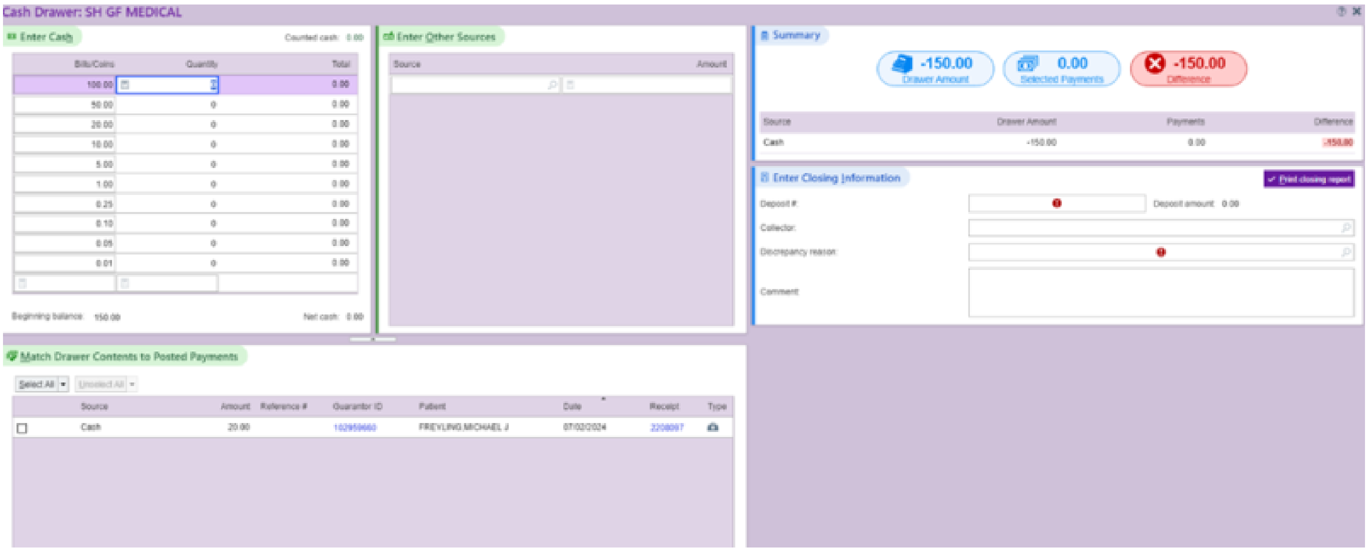
Note: you typically do not need a member ID for ND MA to send a query. The system will pull it unless its ND Medical Expansion.

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.

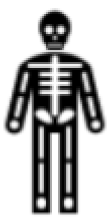
How to count your cash drawer



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 checklists



Start of day checklist

Task	Notes
Turn on all lights	
Open waiting room door	

Task	Notes
Open PSR gate	
Log into computer/phone	Turn on scanner
Log into Epic and Teams	
Tend to provider/Teams requests	For example: When a provider is out, reschedule/move patients
Check voicemails and return patient calls	
Work on patient MyChart messages for your department	
Start on chart prep	
Confirmation calls	

Reminder- check voicemails and return calls as time allows through-out the day!

Afternoon checklist

Task	Notes
Check and return voicemails	For mid-day missed calls

Closing checklist

Task	Notes
Close cash drawer	
Check and return voicemails	
Wipe down lobby chairs, tables, front desk, elevator, door handles, and workstation	Use Clorox wipes and spray
Close gate	
Shut lights off	

Weekly checklist

Task	Notes
No show lists	*Remove?
Work-queue	
Establish letters	*Remove?
Reschedules	
Wait-list	*Remove?