Cover page
Table of Contents
Foreward

Pages
SECTION 1 – Principles, Goals & Organizational Structure
1 Principles
2 Policies and Procedures Manual
3 Clinic Goals
4 Organizational Structure
   Organizational Chart

Pages
SECTION 2 – Licensure, Certification & Training
1 New Employee Orientation (NEO)
2 Licensure / Certification
3 CPR Training
4 Clinical Orientation
5 Training and Development

Pages
SECTION 3 – Promotions, Transfers & Job Descriptions
1 Promotions and Transfers
2 Job Description – Senior Clinics Administrator
3-4 Job Description – Nurse Manager
5 Job Description – Senior Clinic Manager
6-7 Job Description – PSR Team Leader
8-9 Job Description – PSR I-IV
10 Job Description – Radiology Technician
11 Job Description – Lead LPN (Licensed Practical Nurse)
12 Job Description – LPN (Licensed Practical Nurse)
13 Job Description – Senior MA (Medical Assistant)
14 Job Description – MA (Medical Assistant)
15 Job Description – Social Worker

Pages
SECTION 4 – Dress Code, Meetings, Clinic Hours & Noon Nurse Responsibilities
1 Dress Code
2 Monthly Meeting Schedule
3 Clinic Hours
4 Noon Nurse Responsibilities

Pages
SECTION 5 – Staff & Clinician Leave & Time Clock Policy
1-2 Leave (Scheduled & Unscheduled), Tardiness, Occurrences, Administrative Leave, Shared Leave Program
3 Scheduled and Unscheduled Leave ADDENDUM (Office Visits on the Clock)
4-5 Time Clock Policy
6 Inclement Weather Policy
7 Adjusted Work Week/Evening Clinic & Administrative Leave Exemption
8 Clinician Absence Policy
9 Faculty Provider Coverage for Clinic and Service Obligations
## SECTION 6 – Security, Emergencies & Incidents

1. Building Security
2. Emergency Telephone List #1 – Important Campus Numbers
3. Emergency Telephone List #2 – Important FMC Numbers
4. Basic Emergency Procedures
5. Emergency Codes & Evacuation
6. Code **RED** Emergency – Fire in Progress
7. Code **BLACK** Emergency – Tornado
8. Code **ORANGE** Emergency – Bomb Threat, Acrid Smoke, Chemicals, or Other Fumes
9. Code **BLUE** Emergency – Medical Emergency
10. Code **ADAM** – Missing Person
11-12. Workplace Threats and Violence
13. Handling Potentially Violent Situations
14. Employee Injuries on Clinic Grounds
   - [Initial Treatment Acknowledgment Form](#)
15. Handling Deaths in the Clinic
16. Intoxicated or Over-Dosed Patients
17-18. Incident Report Procedures
19-21. Discrimination, Harassment, and Sexual Assault Policy

## SECTION 7 – Telephone Calls, Messages & Electronic Communication

1. Call Center Hours
2. After Hours Calls
3-4. Telephone Etiquette
5. Keywords Indicating the Need to Transfer Calls to Triage
6. Clinician & Employee Telephone Calls & Text Messaging
7. Telephone Messages from Patients
8. Returning Patient Telephone Calls
9. Communicating Electronically with Patients
10. Abusive Telephone Calls
11. Resolution of Patient Concerns/Complaints
12. Residency Application Telephone Calls

## SECTION 8 – Appointment Scheduling, Bumps & Cancellations

1-2. Scheduling Formats & Guidelines
3. Appointment Scheduling
   - [Scripts for Assessing Patients’ Needs When Scheduling Appointments](#)
4-5. Acute Care “Sick” Clinic Scheduling Guidelines
6. Winter Break Scheduling
7. No-Show Patients
8-9. Documentation of Clinic Bumps & Cancellations
   - Attachment – A: Notification to Patient of Need to Reschedule Appointment
   - Attachment – B: OU Physician Group – Group Access Standard
   - Attachment – C: Clinic Key Indicator Report

## SECTION 9 – Patient Reception & Encounter Forms

1-2. Patient Reception
   - [Patient Information Facesheet (Demographic Sheet)](#)
   - [Sign-In Sheet](#)
   - Clinic Brochure – 2 pages
3. Patient Encounter Form Tracking
   - [Encounter Form](#)
4. Daily Batch
14-15 Timeliness of Signing Documents in the EMR
16 Documentation in the Medical Record
17 Standard Medical Record Abbreviations
18 Medical Student Progress Notes
19 New Forms & Form Headings
20-21 External Requests for Chart Reviews, Investigations, and Clinic Site Visits
22-23 Non-Medical Records Retention, Storage Transfer/Retrieval & Destruction of Records
24 FMC Bulk External Records Scanning Guidelines

Pages

SECTION 14 – Prescriptions & Medicines
1-3 Prescriptions, Medication Refill Policy and Authorization
   Controlled Medication Contract – 2 pages
   Pain Committee Consultation Form
4-6 Chronic Pain Patients – Residency
7 Resident & New Faculty Prescription Policy
8 Pharmaceutical Samples
9-10 Safe Handling of Multi-Dose Medication Vials
11 Expired Drugs
12-14 Safe Medication Administration in Clinic Areas

Pages

SECTION 15 – Patient Reassignment & Continuity of Care
1 Patient Acceptance Policy
2 Reassignment of Resident Patients
3 Faculty Patient Reassignment
4 Assignment of New Patients
5 Continuity of Care
6 Coordination of Care
7-9 Dismissal of Disruptive Patients
   Attachments A-F

Pages

SECTION 16 – Patient Care Issues
1-2 Vital Signs
3 Proper Handling of Patients with Contagious Illnesses
4-6 Infection Control
7-8 Informed Consent for Treatment of a Minor and Incapacitated or Incompetent Adult
   Minor Authorization to Treat Form
9-10 Reporting Requirements for Suspected Abuse or Neglect of Children or Vulnerable Adults
11 Health Care for Department Employees
12-13 Use of Interpreters and Translators for Patients with Limited English Proficiency and the Hearing Impaired
14 Service and Therapy Animals in OUP Clinics and OUP Buildings
15 Against Medical Advice (AMA)
   Acknowledgement of Against Medical Advice (AMA) Form
16 Standing Orders
17 Standing Orders - Adult Diabetes Standards of Care
18 Standing Orders – Dental Care & Pregnant Patients
   Guidelines for Oral Health Care in Pregnancy (2 pages)

Pages

SECTION 17 – Medical Equipment & Supplies
1 Exam Room Items
2-3 Cleaning of Surgical Instruments PRIOR to Sterilization/Autoclaving
4-5 Sterilization and Autoclave Procedures
Attachments A-D

6 Dirty Utility Closets
7 Availability of Suture Repair Kits After Hours
8 Crash Carts & Other Emergency Response Equipment
   Crash Cart Contents Check List – pages 1-3
   Crash Cart Weekly Check List – pages 1-2
   Reason for Opening Crash Cart Log
   Code Blue Sheet
9 Inventory / Property Control / Moving Services
10 Medical Supplies Provided to Patients
11 Expired Clinical Supplies

Pages
SECTION 18 – Provider Guidelines
1 Professional Dress at OU Family Medicine
2 Supervision of Physician Assistants
3 1st Year Resident Guidelines
4 Resident Patient Check Out with Attending
5 Hospital Follow-up Guidelines

Pages
SECTION 19 – Special Forms
1-3 Consent Forms
   Consent for Depo-Provera Form
4 Advanced Beneficiary Notice of Non-Coverage (ABN) Form
   ABN Form
5-7 Advance Directives
   Advance Directive for Health Care Form (4 pages)
6 CMS-485 Home Health Certification & Plan of Care
   CMS-485 Form
7 Death Certificates

Pages
SECTION 20 – Vaccines & Injections
1 Injection Documentation in the EMR
2 Vaccine Handling & Relocation During Power Failure
3-4 Seasonal Influenza & Pneumococcal Vaccination
5 Immunization Station
6 Injections & Vaccines – Where & When
   Immunization Worksheet

Pages
SECTION 21 – Miscellaneous Items
1 Media Interaction
2 Procedures to Respond to Search Warrants
3-4 Prevention of Alcohol Abuse and Drug Use on Campus and in the Workplace
5 Tobacco Free Campus
6 Visitors in the Workplace
7-8 Observerships & Visiting Scholar Healthcare Professionals
9 Child Care at Work
10 Appropriate Use of Furniture in Specific Areas
10 Food for Conferences / Meetings
11 Parking on Campus
12 Breastfeeding Friendly Workplace / Lactation Room
### SECTION 22 – Information Technology

<table>
<thead>
<tr>
<th>Pages</th>
<th>Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Acceptable Use of Computing Resources</td>
</tr>
<tr>
<td>2</td>
<td>Internet Access</td>
</tr>
<tr>
<td>3</td>
<td>EMR Access &amp; Training</td>
</tr>
<tr>
<td>4</td>
<td>Data Access of Department Servers</td>
</tr>
<tr>
<td>5</td>
<td>Clinically Speaking</td>
</tr>
<tr>
<td>6</td>
<td>Securing Laptop Computers During Clinic</td>
</tr>
<tr>
<td>7</td>
<td>Laptop Encryption</td>
</tr>
<tr>
<td>8-9</td>
<td>Portable Computing Device Security</td>
</tr>
<tr>
<td>10</td>
<td>IT Systems Disposal &amp; Reuse</td>
</tr>
<tr>
<td>11-12</td>
<td>Use of Social Media</td>
</tr>
<tr>
<td>13</td>
<td>Routine System Maintenance</td>
</tr>
<tr>
<td>14-15</td>
<td>Network Access &amp; Security</td>
</tr>
</tbody>
</table>

### SECTION 22 – Triage

<table>
<thead>
<tr>
<th>Pages</th>
<th>Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Telephone Triage</td>
</tr>
<tr>
<td>2</td>
<td>Telephone Triage – Abdominal Pain</td>
</tr>
<tr>
<td>3</td>
<td>Telephone Triage – Asthma</td>
</tr>
<tr>
<td>4</td>
<td>Telephone Triage – Back Pain</td>
</tr>
<tr>
<td>5</td>
<td>Telephone Triage – Chest Pain</td>
</tr>
</tbody>
</table>
FOREWARD

To All Clinic Faculty, Residents, and Employees of the Department of Family Medicine:

This Policies and Procedures Manual was prepared to supplement the University of Oklahoma Health Sciences Center (OUHSC) Policies and Procedures Manual, the OU Physicians Policies and Procedures Manual, and to state specific procedures as they relate to the operations of The Department of Family and Preventive Medicine and the Family Medicine Clinic. This manual will clarify and inform Department Faculty, Residents, and Employees about current operating procedures.

The information within this manual is current, correct, and effective as of June 25, 2015. The manual will be updated in the form of memorandum or rewrites as needed.

Very truly yours,

Steven A. Crawford, MD
Professor and Chair
Department of Family & Preventive Medicine

I have read and understand the policies and procedures contained herein.

__________________________________________
Employee Signature

__________________________________________
Date