

PURPOSE:

The purpose of this policy is to outline the roles and duties of the staff as they are expected. This policy outlines the training associated with each assigned role.

ROLES OF THE STAFF:

- A) ___ has many roles that are essential to the well-being and success of the clinic. The current roles of the clinic are as listed in the table below.

First Name	Last Name	Job Title
		Administrator; Provider Leader, Nurse Practitioner (FNP)
		Administrative Assistant (MA)
		Behavioral Health Champion-LSWI
		IT Department
		Practice Manager
		Care Coordination (MA)
		Nurse Practitioner (FNP)
		Care Coordination (CNA)
		Care Coordination (CNA)
		Care Coordination (MA)
		Data Entry, Care Coordination (CNA)

DESCRIPTION OF ROLES AND TRAINING:

- A) To provide quality care, it is important that all practice members understand and actively participate in their roles. These roles are outlined as followed:
- a. Administrator
 - i. Responsibilities and Description: The administrator oversee the operations within the company, manages groups, coordinates and engages in planning according to the needs of the company.

- ii. Training: While no certification is required, the administrator should possess basic skills in business and management as well as be an effective communicator and team leader. Experience is OTJ and training may happen through meetings with other entities in order to understand the requirements that are needed to be met.
- b. Provider Leader
 - i. Responsibilities and Description: The provider leader is the lead practitioner that is responsible for initiating and implementing quality improvement activities involving staff under his/her supervision. They have superiority over the other practitioners in the clinic and are responsible to ensure the staff collaborate as an effective team.
 - ii. Training: The physician leader in this case is a nurse practitioner who has the most experience and has seniority over other practitioners. The physician leader holds a current license and demonstrates superior leadership and communication skills. He/she may attend leadership training and other trainings/meetings in order to learn how to be able to best perform with their team as well as learning new policies and procedures as dictated by other entities.
- c. Nurse Practitioner
 - i. Responsibilities and Description: A Nurse Practitioner is a licensed medical professional that is certified under the American Academy of Nurse Practitioners (AANP). A Nurse Practitioner provides health promotion and maintenance through the diagnosis and treatment of acute illness and chronic conditions. They are responsible for overseeing patient care and may delegate tasks and care to the care coordinators as is deemed appropriate. Included in their role is prescribing medications, performing procedures within their scope of practice, diagnosing illness, and providing council to patients.
 - ii. Training and certification-
 1. They have undergone a Master's of Science in Nursing or a Doctor in Nursing program at an accredited University.
 2. They have passed the AANP certification.
 3. They are licensed within the state to practice as a Nurse Practitioner and hold all necessary certifications to be able to practice without restriction within their scope (i.e. current DEA, nursing license, controlled substance, etc.).
 4. Participate in Continuing Education classes as needed.
 5. Renewal of their license as needed.
 6. These providers attend trainings and meetings as needed to provide them with the knowledge necessary to work as an effective health care team.
- d. Administrative Assistant
 - i. Responsibilities and Description: Administrative Assistant duties and responsibilities include providing administrative support to ensure efficient operation of the office. The Administrative Assistant supports the clinic through a variety of tasks related to organization and communication, is responsible for confidential and time sensitive material, and is familiar with a variety of the field's concepts, practices and procedures. S/he is able to effectively communicate via phone and email ensuring that all Administrative Assistant duties are completed accurately and delivered with high quality and in a timely manner. Relies on experience and judgment to plan and

accomplish goals and reports to the administrator. Common responsibilities include billing, assisting with credentialing, and tasks as assigned by the administrator.

- ii. Training: Most of the training for this position is On-The-Job (OTJ). The administrator teaches the assistant how to use the programs that are essential for the practice's success and assigns tasks as needed. For billing, the assistant may be trained through an accredited training program or OTJ and attends meetings that continues their education and updates them as changes are made by insurance companies and other entities.
- e. Behavioral Health Champion (BHC)
 - i. Responsibilities and Description: The BHC is responsible for coordinating with mental health practices in the area. They coordinate, collaborate and are responsible for staff training for behavioral health issues. In additions he/she helps coordinate Behavioral Health treatment and referrals.
 - ii. Training: The BHC must have a degree in social work or other closely related field from an accredited program and pass the ASWB exam to be granted a license. This license must be renewed as needed. He/she attends training meetings as needed to stay up to date on current behavioral health policies and practices.
 - iii. The current BHC is a LSWI- Licensed social worker independent status. She has completed the social work degree from an accredited program and has undergone oversite for the required number of hours and to be granted independent status by the state of Idaho.
- f. IT Department
 - i. Responsibilities and Description: Provides technical support for electronic devices throughout the clinic.
 - ii. Training: Demonstrates proficiency at fixing, repairing, and solving problems with technology. Although no certification or training is required for this position, most people in this department have significant experience in the field and have graduated from a program that specializes in this field. Other training is OTJ or as needed.
- g. Practice Manager
 - i. Responsibilities and Description: The practice manager ensures that the practice runs smoothly. He/she is responsible for scheduling appointments, performing receptionist duties, answering phone calls, and providing an essential line of communication between patients, the nursing/practitioner staff, and other entities (i.e. insurance, hospitals, other practices, etc.).
 - ii. Training: Although there is no certification required, the practice manager must be adept in time management, organization, as well as a clear communicator. He/she must possess adequate computer skills in order to update patient files, fax documents to other facilities, and do other duties as necessary. Previous receptionist experience is encouraged but not required, and OTJ training will be given as needed. In addition, the practice manager attends meetings and trainings as needed to stay up-to-date with policies and procedures of the clinic and other entities.
- h. Care Coordination
 - i. Responsibilities and Description: The care coordinators of the clinic provide essential support to the providers. These individuals have certification as Certified Nursing Assistants (CNA) or Medical Assistants

(MA) and provide medical care within their scope of practice as instructed to by the provider. These individuals assist patients with healthcare needs and supports the work of the providers.

- ii. The two fundamental goals of care coordination are: To transfer information, such as medical history, medication lists, test results, and patient preferences, appropriately from one participant in a patient's care to another. This includes transferring information to or from the patient. To establish accountability by clarifying who is responsible for each aspect of a patient's overall care. This includes specifying who is primarily responsible for key care delivery activities, the extent of that responsibility, and when that responsibility will be transferred to other care participants. The accountable entity (whether a health care professional, care team, or health care organization) accepts responsibility for failures in the aspect(s) of care for which it is accountable. The patient or family also at times may be the accountable entity. The deliberate organization of patient care activities between two or more participants (including the patient) involved in a patient's care to facilitate the appropriate delivery of health care service. (McDonald et al., 2007.) Care coordination improves the quality, appropriateness, timeliness, and efficiency of clinical decisions and care, thereby improving the quality and efficiency of health care overall.
- iii. Summary of Duties:
 1. Assists all patients through the healthcare system by acting as a patient advocate and navigator.
 2. Participates in Patient-Centered Medical Home team meetings and quality improvement initiatives.
 3. Facilitates health and disease patient education, including leading group office visits.
 4. Supports patient self-management of disease and behavior modification interventions.
 5. Coordinates continuity of patient care with external healthcare organizations and facilities, including the process hospital admission and discharge and referrals from the primary care provider to a specialty care provider.
 6. Coordinates continuity of patient care with patients and families following hospital admission, discharge, and ER visits.
 7. Manages high risk patient care, including management of patients with multiple co-morbidities or high risk for readmission to a hospital setting, including a registry.
 8. Conducts comprehensive, preventive screenings for patients and/or assists all support staff in daily patient interactions as needed.
 9. Promotes clear communication amongst a care team and treating clinicians by ensuring awareness regarding patient care plans.
 10. Facilitates patient medication management based upon standing orders and protocols.
 11. Participates on a team for data collection, health outcomes reporting, clinical audits, and programmatic evaluation related to the Patient-Centered Medical Home initiative.
 12. Evaluates clinical care, utilization of resources, and development of new clinical tools, forms, and procedures.

13. The job entails all charting, Annual Wellness Visits, EMR entry, data mining and recovery. The time expected per week is 30 hours combined.

iv. Training

1. CNA- A CNA has successfully completed a training program with curriculum prescribed by the state in which s/he resides. This curriculum includes clinical and skills hours in which the person is able to learn the skills they will be expected to learn. They take a state certification exam with a written exam and a skills assessment and must renew their license every two years with a requirement of at least eight hours of skills to be eligible for recertification.
2. MA- An MA has gone through an accredited medical assistant program and has received certification and is licensed to perform tasks within their scope of practice, which is as follows.
 - a. MAs can only perform tasks they have received appropriate training to perform
 - b. MAs must adhere to the same standards of care as the provider while performing a task
 - c. MAs should only perform duties if a provider is immediately supervising
 - d. MAs must adhere to task procedures as defined by written protocols provided by the provider
 - e. All MA tasks must be verified by the provider who delegated the task
3. Both CNA's and MA's are trained OTJ to use ___'s EHR and follow the clinic policy as determined by the administrator and providers. This training may also include proper procedure on the use equipment within the clinic. These care coordinators attend trainings and meetings as needed to provide them with the knowledge necessary to work as an effective health care team.

i. Data Entry

- i. Responsibilities and Description: This position is responsible for entering data and doing assignments as seen fit by the administrator. This may include entering data to and from the EHR, assisting new providers with credentialing, and updating policy care plans.
- ii. Training: While no training is required for this position, the individual must demonstrate proficiency in the use of programs such as Microsoft Word, Excel, and other similar programs. In addition they must be able to enter data and navigate the EHR and other similar systems as needed.

DATE	ANNUAL REVIEW/ SUMMARY OF CHANGES	APPROVED BY
