

Patient Management: Cross-Training

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content:	CHOICE Cross-Training Diagram

Overview

Cross-training in CHOICE was essential for decreasing patient wait times and improving overall clinic efficiency. This diagram displays common patient-related duties and responsibilities within a LARC-friendly practice, and indicates which staff members were trained to complete each task. The “✓+” in each row indicates primary responsibility. This diagram can be used to consider modifications to your current training structure to improve practice efficiency.

<i>Duties & Responsibilities</i>	<i>CHOICE Project Staff Position</i>				
	Receptionist	Medical Assistant	Contraceptive Counselor	Advanced Practitioner	Project Manager
PATIENT VISIT					
General					
• Read the “LARC Blurb” to patients	✓+		✓		✓
• Schedule patient appointments: initial visit, follow up appointments	✓+		✓	✓+	✓
• Assist patients with directions to clinic	✓+		✓		
• Call patients and confirm clinic appointment	✓+	✓	✓		✓
• Post MA/Clinician schedules	✓+				
• Check main line voicemail/email and return or route calls	✓+				
• Pull scheduled patient charts from medical chart room	✓	✓+	✓	✓	✓
• Provide patient instructions for urine pregnancy test	✓+	✓	✓	✓	✓
• Process urine pregnancy test	✓	✓+		✓	
• Inform patient of positive pregnancy test results				✓+	✓
• Collect patient insurance information	✓+		✓		
• Complete insurance fee tickets		✓		✓+	
• Obtain patient’s height, weight, blood pressure, and medical history		✓+	✓+	✓	✓
• Provide patient with CHOICE contraceptive counseling			✓+	✓	✓
• Discuss emergency contraception with patient			✓+	✓	✓
• Discuss method “bridging” with patient			✓+	✓	✓
• Present patient’s medical history to a clinician			✓+		✓
• Approve patient method initiation and changes based on USMEC for Contraceptive Use and risk of pregnancy				✓+	
• Review approved method use with patient using method fact sheets			✓+	✓	✓
• Retrieve medications from locked storage		✓+		✓	✓
• Prepare condom baggies for patients	✓	✓+	✓		
• Draw blood as necessary		✓+	✓	✓	✓
• Provide social and health service referrals to patients as needed	✓		✓+	✓	✓

	Medical Assistant				
LARC Patient					
• Prepare clinic rooms for LARC insertions		✓+		✓	
• Insert LARC (IUDs, implant)				✓+	
• Remove LARC (IUDs, implant)				✓+	
• Arrange for MD consult as necessary, order diagnostic testing, process orders and facilitate patient obtaining test				✓+	
• Fill out LARC insertion and removal paperwork				✓+	
Refillable Method Patient					
• Write scripts for contraception				✓+	
• Dispense first month's supply of medication to patient		✓	✓+	✓	✓
• Administer birth control shot		✓+		✓	
• Complete procedure notes for birth control injections		✓+		✓	
SEXUALLY TRANSMITTED INFECTION TESTING					
• Provide instructions for self-swab vaginal STI testing			✓+	✓	✓
• Prepare STI samples for shipping to testing site		✓+			
• Perform wet prep, KOH prep and record results				✓+	
• Review STI results and notify patients of positive results				✓+	
• Report positive STI results to state health department				✓+	
• Maintain STI notification and treatment log				✓+	
CLINIC MAINTENANCE					
• Obtain and stock clinical supplies	✓	✓+		✓	
• Clean and sterilize exam rooms after patient visits		✓+		✓	
• Clean and sterilize clinic instruments		✓+			
• Run autoclave and perform biological indicator strip testing		✓+			
• Send biological indication strips from autoclave to testing facility		✓+			
• Record incubator and refrigerator temperatures daily		✓+			
• Count and track method stock		✓			✓+
• Monitor birth control expiration date		✓+			✓
• Test lab eye wash		✓+			
• Clean autoclave		✓+			
PATIENT FOLLOW UP					
• Answer clinician phone line, triage calls using electronic database	✓+		✓		✓
• Print clinician call back forms daily; pull corresponding patient medical charts	✓+	✓	✓		✓
• Call in method refills to local pharmacy	✓+		✓	✓	✓

Medical Assistant

• Authorize pharmacy requests for patient refills	✓+				
• Call no-show clinic patients daily and reschedule as necessary	✓	✓+	✓		
• Provide social and health service referrals to patients as needed	✓		✓+	✓	✓
• Facilitate requests for transfer of medical records	✓+			✓	
• Answer patient questions about contraceptive methods and use	✓		✓+	✓	✓
• Return patient clinical calls; make recommendations for follow up appointments, self care, outside provider care, or emergent care				✓+	
• Arrange for MD consult as necessary				✓+	