

# Clinical Competency Checklist

## Clinical

### Patient intake procedures/documentation

Medical / family history  
Social history  
Medications  
Other \_\_\_\_\_

### Vital signs

B/P  
Orthostatic B/P  
Height / Weight  
Temperature  
Pulse  
Pulse Ox

### EKG

### Injections

IM  
Sub Q  
Intra Dermal  
Log documentation  
Immunization dose, schedule, and storage  
Vaccination Info Sheet

### Splint Application (As applicable)

Ankle  
Boot  
Wrist  
Arm Sling  
Crutches  
Other \_\_\_\_\_

# Clinical Competency Checklist

## Patient discharge instructions

- Review of treatment plan
- Medications prescribed
- Signs and symptoms of improvement or worsening
- Patient callbacks
- Other \_\_\_\_\_

## Medications

- Review drug formulary
- Safe storage and handling of medication protocols
- Medication administration policies/procedures
- Policies/procedures for medication documentation in EHR
- Review clinic pharmacology training program
- Medication/sample logs

## Laboratory

- Blood draw/stick
  - Butterfly
  - Capillary
- Urine collection – Using clean catch method
- Urine drug screening collections
- List of in/out of house lab testing
- Training manual
- Binder with equipment manuals
- General policies/procedures for lab testing
- Quality control policies/procedures for lab testing
- Lab testing quality control log
- Tube selection by test and labeling
- Centrifuge use

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## Other Procedures/Competencies

Autoclave

Cleaning of instruments

Ear Lavage

Eye Chart (Snellen)

Oxygen application

PFT

Sterile field and gloving (As applicable)

Throat swab

Wound care/irrigation

Standing orders should be reviewed (These would be created with a medical director)

Other \_\_\_\_\_

## Maintenance

Oxygen logs

Autoclave logs

Temperature logs

Scale calibration

Stocking rooms

Eye wash stations

Biohazard waste

Sharps containers

# Clinical Competency Checklist

## For All Competencies

Conduct and document staff training

## Sample clinical procedure for a training manual

For each clinical procedure, create a teaching and evaluation process (example):

**Temperature:** The sublingual method will be used on all patients ages 7 and up. Probe will be placed and held toward rear molars sublingually until thermometer beeps. Temperature will be recorded in Fahrenheit and any abnormal findings will be reported to provider verbally and promptly documented in patients' EHR.