Instructor: Maritza Castilleja

Program Description

We want to welcome you to Clinical Workup for Emergency, Urgent, and Priority Office Visits Program. Our online training focuses on reviewing office visit levels and types, and look forward to guiding you as we review patient cycles to eliminate duplication of work and establish protocols. This program offers tools to help create just that. This includes an overview of charting, workup testing, and clinical assistance as well as best practices that will help you to efficiently, properly and confidently communicate with your doctor, team, and patients.

Program Prerequisite

- Preliminary Testing Part 1: Common Procedures and Instrumentation
- Preliminary Testing Part 2: Additional Patient Workup and Etiquette
- Patient Scheduling Optimization

Program Resources

- Protocol development tool - digital and print version
- Triage Form

Program Requirements

- Complete all courses within the program
- Pass all assessments with 80% score
- Join us for a live session review

Learning Objectives

- Review office visit level and type
- Overview of office visit patient cycle
- Utilizing phone triage for case documentation
- Clinical assistance for management and treatment

Program Outline

1. **Review of office visit level and type**
   a. In this course the learner will review office visit level and types and when each level should be added to your schedule.
2. **Patient cycle**
   a. Review of pretest, exam room and debriefing your doctor protocols for a comprehensive exam and how each differentiates for an office visit exam.

3. **Documentation**

PATIENTS

    a. In this course we will review how to utilize the triage form for case documentation and elaborate on additional chart notes.

4. **Treatment and Management**

    a. In this course we will review how clinical assistance continues outside of the exam room in relation to referral coordination, ordered tests during the exam, pharmacy protocols, medical office visit tracking.