Ambulatory Care Orientation (ACO)

Program Objectives and Agenda

Orientation Program Objectives

By the end of orientation, learners will be able to:

1. Recognizes the process for reviewing policies, procedures, protocols, instructions for use (IFU), and other resources on UCSF's CareLinks Intranet, and integrate clinical practice with evidence-based resources.
2. Integrates the evidence-based resources shared in orientation into clinical practice.
3. Recognizes the value of knowledge, skills, and attitudes (KSA) necessary in the ambulatory setting to provide quality and safe care.
4. Identifies how nursing clinical professional practice aligns with UCSF Health's Mission, Vision, and Values.
5. Applies effective communication skills to collaborate within a multidisciplinary team and coordinate patient care across the diverse ambulatory landscape.

ACO Day 1

Session Outline

Time	Duration	Activity
8:35 am	10 min	**Introductions**
8:45 am	15 min	**Welcome & Ambulatory Overview**
9:00 am	10 min	**CareLinks Exploration**
9:10 am	30 min	**Emergency AED & BVM Training**
9:40 am	15 min	**BREAK**
10:00 am	150 min	**Self-Guided Activity Stations (LVN & MA Track)** • **Station 1:** Temperature Monitoring & Specimen Handling/Labeling — Beaker *(Mandatory)* • **Station 2:** Masimo and Philips Vital Signs Machine & Manual Blood Pressure *(Mandatory)* • **Station 3:** Emergency Preparedness *(Mandatory)* • **Station 4:** Infection Prevention, Room Turnover and Transmission-Based Precautions *(Mandatory)* • **Station 5:** Soiled Instruments — Inspection, Processing, and Enzymatic Bin Setup *(Optional)* • **Station 6:** Sterile Technique — Sterile Field Setup and Putting on Sterile Gloves *(Optional)* • **Station 7:** EKG Testing — Lead Placement, Acquisition, and Artifact Troubleshooting *(Optional)* • **Closing Activity:** Glow Germ Hand Hygiene Check *(Mandatory - All Participants at Same Time)*
10:00 am (concurrent)	150 min	**Telephone Triage (RN Track)**
12:30 pm	60 min	**Lunch**
1:30 pm	60 min	**Safe Patient Handling**
2:30 pm	60 min	**Simulation Experience #1**
3:30 pm	60 min	**Simulation Experience #2**
4:30 pm	5 min	**Wrap-Up: Survey**

Topics & Learning Objectives

Topic	Objectives
Welcome & Ambulatory Overview	1. Understand the landscape of ambulatory clinical services at UCSF. 2. Discuss what clinics are at the 3 main campuses in San Francisco. 3. Locate the onboarding document that outlines orientation and onboarding requirements. 4. Understand who, how, and why to contact ACRT.
CareLinks Exploration	1. Recognize where to access resources on CareLinks, including an overview of the ambulatory website, scope of practice grid, how to access IFUs, nurse-driven protocols, how to search for policies and procedures, and how to submit an IR.
Safe Patient Handling	1. Demonstrate the ability to use safe patient handling equipment available to ambulatory clinics.
Emergency Equipment Training	1. Demonstrate how to perform high-quality CPR on a manikin. 2. Demonstrate how to apply AED pads appropriately to adult and pediatric patients. 3. Demonstrate how to apply the bag-valve-mask (BVM) ensuring there is no leakage of air. 4. Demonstrate how to position the patient's airway to allow for easy movement of air from the BVM into the patient's airway.

Self-Guided Learning Activity Stations

Station	Competency Objectives
Soiled Instruments	1. Recognize when an instrument's sterility is compromised and should not be used during a procedure. 2. Demonstrate complete documentation of the soiled instrument requisition form according to the ambulatory requisition form tip sheet. 3. Demonstrate the setup and labeling of the soiled instrument enzymatic bin according to UCSF guidelines.
Sterile Technique	1. Identify components of the sterile field. 2. Demonstrate how to set up and maintain a sterile field. 3. Demonstrate how to open and drop items on the sterile field. 4. Identify how to label solutions on the sterile field.
Temperature Monitoring & Specimen Handling/Labeling	1. Demonstrate how to appropriately complete a twice-daily and daily temperature log. 2. Identify key actions to take in the event a temperature excursion occurs. 3. Identify who is responsible for labeling specimens in the clinic. 4. Demonstrate how to label specimens via the Beaker system. 5. Demonstrate how to handle, label, and process urine specimens. 6. Demonstrate how to handle, label, and process biopsy specimens.

Station	Competency Objectives
Masimo & Philips Vital Signs Machine / Manual Blood Pressure	1. Demonstrate correct application and use of the SpO2 probe, blood pressure cuff, and temperature probe according to manufacturer's instructions. 2. Apply correct technique for manual blood pressure measurement, including appropriate cuff selection and sizing, patient positioning, and auscultatory method using a stethoscope. 3. Demonstrate accurate manual blood pressure measurement on a patient in accordance with UCSF ambulatory standards and American Heart Association guidelines.
Emergency Equipment Checks	1. Apply the standardized daily and weekly emergency equipment check process, including inspection of the AED, crash cart, oxygen supply, suction equipment, and emergency medications in accordance with UCSF ambulatory standards. 2. Analyze findings identified during an emergency equipment check — including missing supplies, expired medications, low oxygen levels, or equipment malfunction — and implement the correct escalation and replacement process to ensure equipment readiness.
EKG Testing	1. Apply correct lead placement technique for a 12-lead EKG on a patient, including proper skin preparation, electrode placement, and patient positioning in accordance with UCSF ambulatory standards. 2. Demonstrate the correct workflow for obtaining a 12-lead EKG using the clinic EKG machine, including patient preparation, lead attachment, tracing acquisition, and transmission or routing of results to the provider. 3. Analyze common sources of EKG artifact and technical error — including poor lead contact, patient movement, incorrect electrode placement, and electrical interference — and implement the appropriate troubleshooting steps to obtain a clean, interpretable tracing. 4. Distinguish between an EKG tracing that is technically adequate for provider interpretation versus one that requires repeat acquisition, and determine the correct next step in each scenario.
Room Turnover, Infection Prevention, & Transmission-Based Precautions	1. Perform room turnover in accordance with UCSF isolation precaution sign guidelines by correctly selecting the appropriate cleaning product, applying the required dwell time, donning indicated PPE, using the correct hand hygiene method, and observing the required room vacancy time based on the patient's transmission-based precaution type. 2. Locate where to obtain ambulatory transmission-based precaution signs on CareLinks. 3. Use transmission-based precaution signs as a resource when deciding which transmission-based isolation to initiate for a patient presenting with signs and symptoms of a transmissible disease.

Telephone Triage (RN)

Topic	Objectives
Telephone Triage	**Class Outcome** 1. Perform high-quality, efficient, and safe telephone triage, utilizing established tools for ambulatory nurses. **Class Objectives**

Topic	Objectives
	1. Document a triage call utilizing the .rnteletriagenote SmartPhrase. 2. Evaluate a call utilizing the Assessment of Quality in Telephone Triage (AQTT) tool. 3. Locate telephone triage resources in the UCSF Library and/or PowerDMS. 4. During a simulated triage call, apply decision-based support tools to determine patient disposition, adhering to recommended levels of care, not downgrading without provider approval, and upgrading urgency per nursing judgment. 5. Demonstrate the use of two communication strategies as outlined in the AQTT tool for effective and efficient triage.

Simulation Experience #1 (ALL) — Adult Patient

- Mock Code
- Medication Safety & Vaccine Prep

Topic	Objectives
Simulation Experience #1	1. Function effectively within the clinic team that responds to the emergency, utilizing closed-loop communication, providing high-quality CPR, and delineating roles. 2. Demonstrate the ability to perform an accurate vaccine history review prior to administration. 3. Document medication administration via BCMA prior to administering medication to the patient. 4. Demonstrate medication labeling, preparation, handling, and administration according to Ambulatory Medication Administration Standard Work.

Simulation Experience #2 (ALL) — Adult Patient

- Infection Prevention
- Procedure Set-Up & Instrument Handling

Topic	Objectives
Simulation Experience #2	1. Demonstrate the donning and doffing of personal protective equipment (PPE) according to UCSF policy. 2. Demonstrate proper hand hygiene when providing patient care. 3. Apply the transmissible disease protocol by directing a patient exhibiting signs or symptoms of a transmissible disease to a private exam room immediately upon arrival, prior to registration or rooming in a shared space. 4. Demonstrate correct masking protocol by providing a surgical mask to a patient presenting with upper respiratory infection symptoms upon arrival and before escorting them to the exam room. 5. Select and place the correct transmission-based precaution sign outside the patient exam room based on the patient's presenting signs, symptoms, and clinical history. 6. Communicate potential transmissible disease symptoms to the provider, relevant care team members, and any outside departments the patient is scheduled to see that day, prior to the patient's arrival in those areas. 7. Perform room turnover following the UCSF transmission-based precaution sign guidelines, including correct selection of cleaning product, dwell time, PPE, hand hygiene method, and room vacancy time as indicated by the patient's precaution type.

ACO Day 2

Session Outline

Time	Duration	Activity
8:00 am	4 hours	**InBasket Fundamentals**
12:00 pm	1 hour	**Lunch**
1:00 pm	3.5 hours	**Care Coordination (LVN & RN Track)**
1:00 pm	3.5 hours	**Rooming (MA Track)**
4:30 pm	5 min	**Wrap-Up: Survey**

Care Coordination

Topic	Objectives
Care Coordination	**1.** Demonstrate the use of the 8P Screening Tool in a patient transitions encounter by selecting three patient risk factors that contribute to adverse events post-hospital discharge. **2.** Demonstrate the use of the 8P Screening Tool in a patient transitions encounter by selecting five interventions that reduce adverse events post-hospital discharge. **3.** Recall three steps for submitting a medication prior authorization via CenterX and CoverMyMeds. **4.** Describe where to obtain care coordination resources on the ambulatory clinical resources website. **5.** Apply evidence-based nursing concepts to a case scenario by formulating nursing interventions that incorporate the patient's preferences and values, nursing clinical expertise, and the 8P Screening Tool. **6.** Identify two databases where nurse-driven protocols are cataloged: Nursing Manuals and PowerDMS. **7.** Explain the purpose of nurse-driven protocols and how they empower licensed nurses to independently initiate evidence-based clinical interventions within their scope of practice to reduce delays in care and improve patient safety. **8.** Demonstrate how to document a nurse-driven protocol order initiation and completion in APeX. **9.** Discuss the different categories of nurse-driven protocols: care coordination, medication refill, and labs and diagnostics.

Rooming for MAs

Topic	Objectives
Rooming for MAs	**1.** Demonstrate the documentation of rooming steps in APeX following the Rooming Standard Work document. **2.** Demonstrate rooming a simulated patient following the Rooming Standard Work document.