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# Revision History

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Introduction

This manual includes the policies and procedures for Cardiology Medical Group and replaces all previous manuals and directives. This document will be maintained and updated by designated staff members.

If you have any feedback on the contents of this manual, please let designated staff members know, and he/she will take any necessary action.

About Cardiology Medical Group

Cardiology Medical Group opened on November 28, 2007 when the clinic was established.

Cardiology Medical Group is located in San Diego, CA, and serves both metropolitan and rural areas. The area includes a culturally and age diverse population of about 3,000,000.

Cardiology Medical Group includes six family physicians. The clinic hosts itinerant specialists and family practice residents and provides an urgent care clinic for the general public on evenings and weekends.

The office physicians estimate that almost 70% of the area’s population is attached to their family practices, while their urgent care clinic serves the rest of the population for immediate care issues.

The area is also served by the BC Ambulance Services and several Vancouver Island Health Authority Services including Home and Community Care based in Esquimalt, public health services, and an Environmental Health Officer.

The closest hospital is Community Hospital approximately 25 km away.

Changes to This Manual

Our philosophy is one of continuous improvement, using the Plan – Do – Study – Act quality improvement process. We expect frequent changes to this manual as we continuously implement improvements in our policies and processes.

The physicians approve any changes to policy or procedures.

The designated staff members facilitate policy and procedure change requests, document changes, and update this manual.
Anyone may develop a policy or process for consideration by the physicians. Everyone should be looking out for and communicating improvements to the way we work.

**Cardiology Medical Group Values**

Cardiology Medical Group is a group family medicine clinic based on the following ideals

**For everyone on the team:**
- Patient centered focus for planning and care.
- Supportive, inclusive, multidisciplinary team approach to Family Medicine.
- Respect for all roles in the multidisciplinary team and tolerance of our differences.
- Open and clear communication among all team members.
- Recognition of and respect for all team members’ private lives.
- Mindfulness in delivering efficient and cost-effective services.

**For the physicians:**
- Shared on-call responsibilities.
- Cross-coverage of each other’s practices when needed.
- Consensus decision-making based on a structured, consistent approach.
- Physicians as a resource to the larger community.
- Collaborative approach to teaching responsibilities of medical residents and students.
- Rotating community roles.
- Needs-based planning (services based on community needs and capacity, not previous activities or physician interests).
Physicians

Introducing Your Physicians

Cardiology Medical Group has six physicians, including:

Joe Surfer MD CCFP MHSc

- Joe graduated from the University of Calgary medical school in 2003 and completed family practice residency in Vancouver in 2005. He also obtained a Masters of Health Sciences in community medicine and epidemiology at UBC in 2010.
- Joe’s practice interests include primary mental health care services and pediatric medicine.
- Joe is married with 2 small children. He enjoys an active lifestyle including competing in marathons, kayaking, biking, and skiing.

Physicians’ Hours of Work

The physicians have a standard schedule that is the basis for Cardiology Medical Group hours. Physicians may choose to alter their hours at their own discretion as long as the physician provides the other physicians and staff with as much notice as possible.

Locum Arrangements

When the physicians are away from the clinic for holidays or other absences, they should arrange for a qualified physician (locum) to provide relief coverage.

Physicians establish locum arrangements under a private arrangement between themselves and the locum.

The processes for setting up a locum arrangement are as follows:

1. Cardiology Medical Group physician finds a locum physician to fill the vacancy.
2. The locum physician completes the Assignment of Payment Agreement.
3. The Cardiology Medical Group physician pays the locum according to the Assignment of Payment Agreement.
Staff

The Cardiology Medical Group employs 5 office assistants. Cardiology Medical Group also employs the following positions:

- Business Manager: Contacts and schedules staff and manages finances. For more information, see Business Manager Job Description.

- Medical Office Assistant: Coordinates patient care and performs administrative duties. For more information, see Office Assistant Job Description.

Business Manager Job Description

Reports to:

Physician responsible for Human Resources

Job Purpose:

Carries out several aspects of office administration, including:

- Manages finance including payroll, bookkeeping, assisting the physicians in developing and maintaining a budget, financial reporting, banking, cash flow, etc.

- Serves as the main point of contact between the office staff and physicians for matters pertaining to pay, benefits, and hours worked and makes Human Resources decisions in accordance with policies established by the physicians.

- Coordinates performance review process for office staff.

- Coordinates staff and physician recruitment, orientation, and training activities.

- Recommends, plans, and implements pay structure revisions.

- Ensures compliance with applicable human resource laws.

- Maintains employee human resource files.

- Develops, recommends approval, and maintains staff hours and vacation schedules.

- Provides advice to physicians on finance, human resources, and other administrative matters.

- Performs other related duties as required.
Office Assistant Job Description

Reports to:
Provider responsible for Human Resources

Job Purpose:
To support Cardiology Medical Group physicians in clinic operations and delivering patient care. All work should be delivered to standards and procedures established in Cardiology Medical Group and requested by physicians.

- Coordinates patient care through the clinic by checking in patients, prepping patients, escorting patients to exam rooms, and preparing exam or treatment rooms for the next patient.
- Answers inquiries by phone and in person in a helpful, respectful, and efficient manner.
- Operates fax machines.
- Maintains appointment schedule and manages recalls.
- Maintains electronic medical record, including the patient chart.
- Ensures exam rooms are stocked appropriately, and ensures that they are ready for the next patient.
- Ensures patient confidentiality.
- Cleans and sterilizes materials and instruments.
- Performs patient prep procedures, and documents findings on the patient record.
- Performs billing procedures for multiple payers, and applies and collects non-insured fees where applicable.
- Orders and receives office and medical supplies.
- Performs all other related clinical tasks, administrative tasks, or special tasks as required.

General Skills and Abilities
- Works well in a team environment.
- Exhibits good written and verbal communication skills.
- Demonstrates proficiency with a computer, including using the internet, medical software, and Microsoft Office software.
- Performs tasks with speed and accuracy.
• Solve problems with ease.
• Shows good judgment.

**Immunization**

Office offers all staff immunizations appropriate for their duties at no cost. This includes influenza and hepatitis B.

**Bonding of Employees**

Precautionary measures are sometimes taken to ensure adequate protection of property, personnel, assets, etc. Cardiology Medical Group may opt to bond certain employees with specific or sensitive responsibilities within the office.

**When the Physician Is Away**

When the physician is out of the office during normal office hours, coverage must be maintained. With approval, you may do one of the following:

• Work in the office.
• Take time off without pay.
• Take time off and use vacation.

**Continuing Education**

Keeping up-to-date professionally is a benefit for you, the practice, and the patients. Your attendance at meetings, lectures, and training programs will be counted as hours worked, and wages will be paid when such sessions are conducted during your normal work schedule with the approval of the office manager.

Attendance will not be counted as hours worked when any of the following is true:

• You attend the training after normal work hours.
• The training is not directly related to your job.
• You do not obtain approval to attend during normal work hours.
License Recertification

Technically certified office staff are responsible for maintaining valid licensing by attending the necessary number of continuing education courses required for recertification. Staff members are required to attend such courses during non-scheduled hours and will receive no pay during such attendance.

Cardiology Medical Group assumes no responsibility for staff members who become delinquent in the number of units needed for recertification and who lose their license as a result.

Providing Advice without a License

Over time staff gain knowledge regarding certain standard medical advice given to patients. However, from a legal standpoint, when a patient/client has a medical question, you must inform the person that you will relay the question to the physician, and then get back to them with the answer to their questions. Non-licensed staff should never provide medical advice without consulting licensed staff.

Dating Patients

Sometimes a patient wants to date a staff member, and sometimes a staff member wants to date a patient. Regardless of who initiates the interest, it could present problems for the office and could be considered unethical. This includes flirting in any fashion. Cardiology Medical Group is here to provide a professional service to our patients.

In such a situation, it is the responsibility of the employee to discuss the situation with the physician and/or office manager to determine the most appropriate method for dealing with the situation.

Manual Handling Techniques

Before you lift someone or something, ask yourself whether the job could be done in a different way. For example, can you:

- Get someone to help you.
- Use mechanical aids for lifting or trolleys.

Assess the weight of the load before you lift. Only carry loads you can handle with ease.

Prepare to lift
1. Stand close to the load with your feet spaced apart.

2. Bend at the knees, and keep your spine straight.

3. Grip the load firmly.

Lift

1. Tighten your stomach muscles.

2. Lift by straightening your legs.


4. Do not twist, move, or jerk suddenly.

5. Do not lift objects higher than your waist.

Move and carry

1. Make sure that your path is clear.

2. Keep the object close to your body.

3. Take short steps and move carefully.

4. Avoid sudden or jarring movements.

Lower

1. Keep your back and neck in a straight line.

2. Tighten your stomach muscles.

3. Bend at the knees. Never bend from the waist.

4. Place the load firmly on the ground.