

## ESTABLISHING A CLINICAL SITE.

### BE PREPARED

- Download Residency Package see attached,
- Print off and READ, read information on role of Nurse Practitioner, feel comfortable in explaining the role, Practice with family and friends. DO SOME RESEARCH!
- Become fluent with all pieces of Residency Package. Be able to comfortably describe your role, the Preceptors role and Faculty role.
- Develop a Professional looking Portfolio: include vitae, card/contact information, what you see as your contribution and value to the practice/clinic. Emphasize what you can bring to the practice/clinic the skills you have that make YOU unique.



### FINDING A SITE

- Where you live and local clinics/practices in area
- Connections through friends, relatives, colleagues
- Doctors who you know at the place of employment
- Site that matches your philosophy
- Site that matches your uniqueness
- Search the Yellow Pages.
- Search the OSHPD site for Clinics that serve Medically Underserved Pop.
- Look in the Preceptors Books on Campus
- At some point you actually have to call or drop by with your very professional portfolio and appreciation sentiments to attain entre. Don't leave this process too late – Showing up for Clinical course work in fall without your clinical site set is a bad idea. You are already behind in hours the first week.

### GETTING IN THE DOOR

- Professional Dress, Grooming, General Demeanor.
- Intro Self to Possible Preceptor.
- Intro to Practice/Clinic Manager (IMPORTANT PERSON).
- Intro Self to Clinic/Office Staff (OTHER IMPORTANT PEOPLE -Front, Back, Billing etc).
- Appreciation sentiments.
- Have all your paperwork on hand and ready and organized in an easy to present manner (binder- folder) - have extra copies of everything so that you can leave it in if they are willing to consider.

## THINGS TO DISCUSS IN MEETING

- Review the Residency Package and Expectations for all Parties (Student, Preceptor, and Site); emphasize your role and your background and your special skills.
- Ask about the Practice/clinic, make sure you do your homework up front so that you appear knowledgeable about the type of clients/pop served.
- Ask about the Practice/Clinic Philosophy/Beliefs
- Who is the contact person you will communicate with regarding decision to Precept.

## THE PROCESSES FOR GETTING THE DEAL SEALED

- There are three possible ways that one can “contract” with a site/clinic/agency.
- The least complex and most straight forward to initiate is having the “site” sign the “LETTER OF AGREEMENT” – **in Residency Package**. At the meeting present them with the Letter of Agreement and if they are willing have them sign or let them know when you will follow-up. This is often the manner of the contracting in private practices.
- A Memorandum of Understand (MOU) is another way that this process can be done expediently and this process takes 2 -4wks. The Department of Nursing – Wendy Smith has to have the name of the contact at the site and an expedient and dependable way to communicate with the above person (often Office Manager or Clinic Manager/Risk Manager). Common in Community clinics and FQHC.
- Finally and the most complex are “State Agency Contracts” you will need to find this out asap as the “State Agency Contracts” take at least 6 -8 wks to process through systems. The Department of Nursing – Wendy Smith has to have the name of the contact at the site and an expedient and dependable way to communicate with the above person (often Office Manager or Clinic Manager/Risk Manager). Many “sites” are part of larger Entities – Sutter, CHCW, Kaiser, and these types of sites often need a State Agency Contract. We may have a contract executed with some of these entities so check with Ana Munoz in Nursing Department once you have identified a possible site.
- Do they need to speak with the Director or Clinical Faculty Coordinator?

## WHEN THE DEAL IS SEALED

- Arrange a meeting time with your preceptor discuss office/practice routine, things such as who will room, who will do vital signs, what room will you use, how to they want you to address them, how will you present your patients – interrupt preceptor or wait until they come out of room etc. How will the ordering of medications and prescriptions be handled. Suggest/ask for direction on how they may introduce you to the practice what is process?
- Talk about typical “client care visit” review the expectations (in the Residency Package).
- How will you chart, if the site has EMR how will you gain access and have training with the program? What about shadow charting?

- How will the superbill be handled – will the preceptor check off the ICD9's and CPT codes?
- If the preceptor is a CNM or NP or there are NPs on site where are the Standardized Procedures and Process Protocols.
- How are decisions made in the practice – staff meetings, provider meetings- should you attend?
- Appreciation Sentiments.

