

# Clinical Services Preceptor Job Description



**Position Title:** Clinical Services Preceptor  
**Reports to:** Director, Clinical Services  
**Job Status:** Full-Time  
**FLSA Status:** Non-Exempt  
**Positions Supervised:** None

**Position Summary:** Teach, support, counsel, coach, evaluate and serve as a role model for new Clinical Services Team Members. Train and support current Clinical Services Team Members. Perform Clinical Services Team Member job duties at different office locations when needed.

## **Essential Functions:**

To accomplish this job successfully, an individual must be able to perform, with or without reasonable accommodation, each essential function satisfactorily. Reasonable accommodations may be made to help enable qualified individuals with disabilities to perform the essential functions.

### Preceptor:

- Facilitate and help new and current team members meet the essential functions of the Clinical Services Team Member job, understand CVFP practices, policies and procedures and meet personal and practice objectives.
- Serve as a role model, provide leadership and demonstrate professionalism.
- Serve as a resource by guiding new and current team members to appropriate resource materials and management when appropriate.
- Guide and assist new team members in the integration into CVFP culture and environment.
- Nurture, support and guide new and current team members through training and mentoring.
- Monitor time management and productivity of new and current team members.
- Provide valuable formative and summative feedback from the training and mentoring process to Practice Manager.
- Work at different CVFP office locations as needed.
- Perform all other duties as assigned.

### Clinical Services Team Member:

- Observe patients and assess their general condition, measure and record vital signs, record reason(s) for visit, document review of systems and document changes in patient conditions in the electronic medical record.
- Communicate with and assist patients in a professional and courteous manner.
- Conduct pre-visit planning by reviewing and updating patient charts prior to time of visit, including recent test results and correspondence and determine needed services per office protocol. Communicate with provider regarding any incomplete tests, consults or orders prior to time of visit.

- Assist provider with examination of patient and administering diagnostic tests, procedures and treatment. Provide basic patient care as directed by provider and as allowed by license, certification or registration.
- Document all activities, interventions, patient and family responses, medications dispensed and prescribed, etc. during the patient visit in the electronic medical record.
- Work as part of the healthcare team to assess patient needs, plan and modify care and implement interventions. Communicate with the healthcare team to provide a proactive approach to patient care.
- Obtain lab, x-ray and other reports and results, hospital notes, referral information, consults, etc. Monitor, track and resolve outstanding orders, referrals, consults, labs, procedures, etc. in EMR.
- Notify patients of lab results, any changes in provider orders, specialist appointments, etc. and document notification in the EMR.
- Complete forms and obtain ABNs as needed or required by patients' insurance.
- Make referral and/or specialist appointments and schedule other tests, treatments or procedures as needed.
- Provide patient education materials and communicate provider advice and instructions.
- Answer patient calls and determine how to assist them as needed. Triage patient needs and identify necessary plan of action within office policy such as scheduling an appointment, triaging for provider or directing the patient to the ER, etc. as needed.
- Set up instruments and equipment according to office protocols and prepare exam and procedure rooms. Clean exam and procedure rooms, instruments and equipment between patient visits to maintain infection control.
- Maintain accurate logs (injectables, refrigerator temperature logs, equipment maintenance, CLIA, etc.) and report variances to the Practice Manager or supervisor immediately.
- Check and maintain the defibrillator.
- Order, sort and store supplies to ensure availability as needed for patient care. Restock exam and procedure rooms. Store all refrigerated supplies timely.
- Adhere to infection control safety guidelines and confidentiality policies.
- Complete training for Centra's Provider Portal and utilize the Portal to obtain test reports and results, consult notes and other records as needed.
- Fulfill organizational responsibilities as assigned which include: respect and promote patient's rights, respond quickly and appropriately to emergency situations and share problems relating to patients and/or team members with Practice Manager or supervisor quickly. Provide safe, patient centered, compassionate and competent care.
- Establish and maintain effective working relationships with patients, providers, team members, insurance companies and the public. Work with peers and providers in a team environment.
- Participate in quality improvement projects. Attend training and meetings as required. Maintain annual competencies for medical assistant certification or registration or nursing license. Maintain CPR certification.
- Work at different CVFP office locations as needed.
- Perform all other duties as assigned.

### **Competencies:**

- Knowledge of electronic medical record and practice management systems, specifically Allscripts PM and EHR.

- Has the desire to teach and support others and the ability to adjust teaching style to the learning needs of new and current team members to facilitate successful training and mentoring.
- Knowledge of medical terminology.
- Knowledge of medical office principles, standards, applications and tests.
- Knowledge of medical office safety, cleanliness and infection control policies and regulations.
- Knowledge of medical office equipment uses and maintenance.
- Accuracy – Ability to perform work accurately and thoroughly.
- Communication – Ability to communicate effectively verbally and in writing.
- Computer Skills – Proficient ability to use a computer and electronic medical record.
- Confidentiality – Maintain patient, team member and employer confidentiality. Comply with all HIPAA regulations.
- Customer Service Oriented – Friendly, cheerful and helpful to patients and others. Ability to meet patients and others needs while following office policies and procedures.
- Decision Making – Ability to make critical decisions while following CVFP policies and procedures.
- Detail Oriented – Ability to pay attention to the minute details of a project or task.
- Flexibility – Ability to adapt easily to changing conditions and work responsibilities.
- Leadership Skills – Ability to influence others to perform their jobs effectively and to be responsible for making decisions.
- Positivity – Display a positive attitude and is a positive agent for change.
- Teamwork – Work as part of a team and collaborate with co-workers.
- Working Under Pressure – Ability to complete assigned tasks under stressful situations.

#### **Education and Experience:**

- High school diploma or equivalent required
- Associate's Degree or higher preferred
- Medical office, mentor or preceptor experience preferred

#### **Certification and Licensure:**

- CMA or RMA certification or LPN or RN license required
- Other related certifications and licenses will be considered (i.e. RT(R), MLT, CPhT)

#### **Work Environment:**

- Environmentally controlled medical office environment
- Fast paced environment with occasional high pressure or emergent situations
- Frequent exposure to bodily fluids
- Possible exposure to infectious specimens, communicable diseases, toxic substances, ionizing radiation, medicinal preparations and other conditions common to a laboratory and medical office environment
- May wear Personal Protective Equipment (PPE) such as gloves or a mask
- Frequent interaction with a diverse population including team members, providers, patients, insurance companies and other members of the public

#### **Physical Demands:**

- Frequent standing, walking, grasping, carrying, reaching, bending, stooping and speaking
- Occasional sitting
- Lifting, carrying, pushing and pulling up to 50 pounds, with assistance if needed

- May need to lift or turn patients who are disabled, with assistance if needed
- Frequent use of computer, keyboard, copy and fax machine and phone

CVFP has reviewed this job description to ensure that essential functions and basic duties have been included. It is intended to provide guidelines for job expectations and the team member's ability to perform the position described. It is not intended to be construed as an exhaustive list of all functions, responsibilities, skills and abilities. Additional functions and requirements may be assigned by supervisors, managers, directors or officers as deemed appropriate. This document does not represent a contract of employment, and CVFP reserves the right to change this job description and/or assign tasks for the team member to perform, as CVFP may deem appropriate.

**Team Member Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_