

## Outpatient Clinical Guidelines

### Orientation to the 4th floor outpatient clinic (OP4):

Contact Peter Schmidt, M.D. (Chief OP4) or Ms. Marlene Clark (both at 301-496-6565) who will coordinate your orientation to the NIMH Clinic.

### Administrative Structure:

1. Clinical Center Staff - All outpatient clinics within the Clinical Center (CC) are administered and maintained by the Ambulatory Care Department (Chief - Ms. Karen Kaczorowski). A member of her staff, Mr. Larry Bauer (301-496-7710 or pager 102-14873), is the Nurse Manager for the CC Behavioral Health Programs, which includes the NIMH Outpatient Clinic (OP4): he supervises the clinical research-related activities of 11 ambulatory care nurses. Each of the OP4 nursing staff has been assigned specific research projects. Mr. Bauer also supervises Ms. Clark, the Clinic Support Assistant, who is involved with documenting patient care appointments and maintaining supplies in the Clinic.

2. NIMH Staff - Peter Schmidt, M.D. is the Clinic Chief and as part of the activities of the Office of the Clinical Director, NIMH he administers resource allocations within the Clinic, facilitates NIMH clinical research, and implements NIMH quality assurance programs. Your Program's census is the principal data used to determine resource allocation. Please make certain that you register each appointment in order to receive credit for your work.

### Patient Care Within the Outpatient Clinic:

- Prior to seeing patients in the Clinic make sure that you have provided your contact information (including your pager if you have one) to Ms. Clark.
- Availability - If you schedule an appointment, please be present in the Clinic at the time when the patient is due to arrive. If you are unable to be on time for the visit, please contact Ms. Clark ahead of time and inform her that you will be late. When paged, return the call promptly (the clinic number is 301-496-6565). The clinic clerk is not a receptionist and he or she is not required to alert you when your patients arrive.
- No patients or healthy volunteers should be seen on OP4 until they have been processed by the Admissions Department and assigned an active medical record number. Additionally, an appointment slip should be filled out for every patient contact, and your patient must check-in with the OP4 clinic clerk prior to your visit with them. These procedures will ensure that we

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### Patient Care Within the Outpatient Clinic: (cont.)

have the appropriate documentation of the appointment in case there is a medical/legal incident related to your patient encounter, and will be used to establish your census. You will be shown how to complete the appointment slip during your orientation visit with Ms. Clark.

- **All patient contacts should be documented in the medical record** for medical/legal reasons and for your protection.
- All progress notes must be signed or co-signed by a credentialed member of the medical staff.
- Good Citizenship - All of the NIMH Clinical Branches and Sections perform at least some component of their program on an outpatient basis and, therefore, numerous investigators are independently pursuing their individual projects within the Clinic. Thus, we ask that you respect the needs of other investigators working in the Clinic. In particular, we ask that you personally take responsibility to ensure that after you have finished with a clinic room, it is left in the state in which you found it - so the next person to use the room will not need to clean it up.
- Safety is critical in the outpatient setting. It is important that your patients do not threaten the safety of the other patients or staff in the Clinic. Thus, please screen your subjects carefully to evaluate their level of behavioral control. If you have concerns about a patient please notify Larry Bauer or the charge nurse.
- Confidentiality - Patient confidentiality at the Clinical Center must be maintained. Please be aware, that the charting area within the Clinic is not enclosed or sound proof and your conversations are easily heard by people in the waiting room. Several patients have expressed concerns that they have overheard staff discussing details of other patients' care.
- Children must be supervised by a member of your staff while they are waiting in the Clinic.
- Any obstacles to your efforts to provide patient care (e.g., patients delayed by security or parking problems) should be reported through the Clinical Center's Occurrence Reporting System. This remains the principal mechanism to communicate problems in the provision of patient care and provide data needed to modify and correct these problems.
- To order a breakfast or lunch for a subject, fill out a request form (Ms. Clark has the form) as soon as you know the date of the appointment but no later than 3:45 p.m. on the day before the appointment.

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### A Few Reminders about Conduct with your Patients: (cont.)

- Physical exams - Exams involving a male care-provider and a female patient are required to have a female chaperone.
- All members of the staff who obtain human tissue samples should be trained in universal precautions. Of note please be reminded that gloves should only be worn during phlebotomy and while the sample is placed in a specimen transmittal bag. The wearing of gloves to carry the bagged specimen outside of the clinic room or lab is in violation of NIH Hospital Epidemiology Guidelines and may serve to contaminate public areas (e.g., door knobs and telephones). Please try to avoid even the appearance that you are in violation and, therefore, do not walk around the Clinic with gloves on.
  - "Off-hours" use of the Clinic. Use of the Clinic after 4:30 p.m. on weekdays and on weekends is encouraged (see below). Please be reminded that during off-hours a member of the credentialed medical staff must be present in the Clinic during an appointment.
  - Emergencies - An NIMH nurse and an NIH social worker are on call 24 hours a day and can be contacted through the NIH Page Operator (301-496-1211). The NIMH Officer of the Day may also be called when appropriate. Finally, the Ambulatory Care Department may assist your patients in several situations (e.g., parking violations or towed cars).

### Using the Clinic "After-Hours":

- To see patients during a weekday evening (after 4:30 p.m.) or during the weekend you may use the 4th floor clinic, however, the 4th floor clinic is locked on weekdays after 7:00 p.m. and throughout the entire weekend. To access the clinic during off-hours you will need a clinic card key (if required, please speak with Ms. Clark). There must be at least two staff members present when working with a subject in a "closed clinic" (i.e., no regular staff present) area. At least one staff member must be a credentialed member of the CC medical staff. If there is a likelihood of a psychiatric emergency for a subject, he/she should be seen during regular clinic hours.
- To prevent your patient from getting lost during off-hour visits, meet them at the Admissions Desk and escort them to the clinic. To notify clinic staff of your intention to see patients off-hours: Write a memo requesting use of the Clinic. Specify the day, time, and estimated length of the visit. Address the memo to: Peter Schmidt, M.D., Chief OP4, and cc to Donald Rosenstein, M.D., Clinical Director; Karen Kaczorowski (CC/OPD); Larry Bauer, R.N.; NIH Police; and Ms. Clark. Give the memo to Ms. Clark and she will take care of its distribution. You do not need to sign up for a specific clinic room since the clinic will generally be empty during off-hours.

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### Scheduling Outpatient Appointments:

#### Regular Appointments:

- To schedule a regular appointment (not a first visit) complete an appointment slip (leave the completed form in the black index card container in front of Ms. Clark's work area or fax it to 301-402-4345. Include the following information:
  1. Subject's name
  2. Subject's medical record number
  3. Location of visit (usually OP4 or 15K)
  4. Institute (MH) and Branch (two letter designation)
  5. Physician's name (must be credentialed)
  6. Appointment date and time
  7. Protocol number.
- Appointment requests for 15K need to be received by 1:30 p.m. on the day prior to the appointment to ensure that the medical record will be available for the appointment.
- Sign up for a room by either:
  - Contacting Ms. Clark directly by either telephone (301-496-6565) or e-mail or signing the clipboard, which is located on the counter in front of Ms. Clark's work area (the sign up sheet for each month is available by the third week of the preceding month).
- If the subject cancels, notify Ms. Clark as soon as possible so that the room can be made available to others.
- If you sign up for a room but no subject is scheduled within 24 hours of the appointment time, then the room reservation will be cancelled.
- The 5 SW Day Hospital is now available for patients who are scheduled for procedures. The unit phone number is 301-451-0671.

### First Visit Appointments:

- Prior to a First Visit/Screening appointment fill out the admission form (form 54) electronically in CRIS or on paper and send it to the Admissions Department. Submit the completed form 54 at least two days prior to the appointment. [Note: A subject may already be registered in CRIS. In this case, you should use the form 54 to communicate changes in the attending physician, Branch affiliation, and the specific protocol in which the subject will be participating to the Admissions Department.]
- Fill out an appointment slip to schedule the appointment as you would for a regular appointment.

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### First Visit Appointments: (cont.)

- Remember to schedule a room.
- Subjects must be registered by the Admissions Department and have a NIH medical record number and chart prior to being seen in the clinic. For first visits, advise your patients to arrive at least 30 minutes early for their appointment to prevent them from being late for your appointment in OP4. You should send new patients a copy of the campus map (available at: [http://clinicalcenter.nih.gov/about/visitor/\\_pdf/campusmap\\_color.pdf](http://clinicalcenter.nih.gov/about/visitor/_pdf/campusmap_color.pdf) and inform them about NIH security procedures. The location of the parking garage and the option of valet parking also is useful information.
- Each subject must have a credentialed physician who is medically responsible. Subjects must sign a protocol consent form before starting the screening interview. Protocol consent forms are available at: <http://www.cc.nih.gov/protocolconsents/>. Only the consent forms from this NIH website are considered valid and up to date. The consent form must be signed by the subject, the PI or an investigator involved with the protocol (any investigator whose name is on the protocol), and by a witness. The IRB may mandate that someone from the Central Office for Recruitment and Evaluation (CORE) team witness the consent process. In addition, a member of the CORE team must witness the informed consent for all of the inpatient admissions. If someone from the CORE is required to witness the consent, you can contact them in advance (Cherri Stanmore at 301-402-6846 or through global e-mail; Pam Holmes (301-402-6843) or page them for urgent matters (301-554-1925). The original consent form goes in the NIH medical record (in the consent form section) and the subject is given a copy. Also you should retain a copy for your research records.  
If a capacity assessment is appropriate for a research subject, this can be performed by a member of the CORE team

### Documentation of First Visit:

The Clinical Center requires that the First Visit Registration Form (screening note) be completed for all new subjects or for subjects who have not participated in a NIH study for over five years. You can get a template and modify the First Visit Registration Form to conform with individual protocol needs (e.g., screening versus clinical trial). You must have Tracy Matarazzo, who is the documentation review coordinator (phone 301-496-2271; email: [tmartaraz@mail.cc.nih.gov](mailto:tmartaraz@mail.cc.nih.gov)), review and approve the template.

The First Visit Registration Form must include the following elements:

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### Documentation of First Visit: (cont.)

The First Visit Registration Form must include the following elements:

1. Date of visit.
2. History and physical examination and significant findings (if the screening is prolonged and lasts longer than one day, then the physical can occur after the first visit but must be prior to any research).
3. Clinical diagnoses.
4. Plan of evaluation.
5. Operations/procedures and dates performed.
6. Instructions to patient and disposition.

You have the choice on the first registration to either write out the note or to do a telephone dictation.

To use the NIH telephone dictation system you must take a medical record orientation class and receive a nontransferable four digit ID code.

You may also use the electronic signature authentication system, which allows you to edit the dictation report on the web and to sign it electronically. To sign up contact Tracy Matarazzo (phone 301-496-2271; email: [tmartaraz@mail.cc.nih.gov](mailto:tmartaraz@mail.cc.nih.gov)).

The Review of Systems Check-list (available in the clinic) is optional. If you use this form, a physician must review and sign it.

### Ordering Procedures in OP4:

Clinical Pathology - Outpatient lab work is ordered through CRIS. If you are obtaining the sample in the clinic, you may place the order in CRIS and attach the order label from the printer to the specimen. Please enter all labs for Phlebotomy as "Future Outpt/Pre-Admit".  
! All other outpatient procedures (e.g., EKG, CXR) are also ordered through CRIS.

### Secure e-mail:

All electronic communications containing patient information should be transmitted via "secure e-mail." To have secure e-mail set up, e-mail: [securemail@cc.nih.gov](mailto:securemail@cc.nih.gov).

## Outpatient Clinical Guidelines

### Important Telephone Numbers and Hours of Service:

Contact Information:

Admissions (outpatient) 301-496-3141

Drug Information 301-496-2407

Educational Services Office 301-496-1618

Escort 301-496-9296

Local Transportation 301-496-1161

Messenger and Escort (to pick up samples weekday evenings) 301-496-9296

OMS (Visitor's Medical Emergency) 301-496-4411

Outpatient Pharmacy 301-496-2866

Patient Representative (Laura Cearnal 301-496-2626)

Sign Language Interpreters 301-496-2906

Travel Office 301-496-7632

Voucher Office 301-496-4530

Volunteer Services/Interpreters 301-496-1807

Hours of Operation:

Phlebotomy - 7:00 a.m. to 4:15 p.m.

OPD Pharmacy - Monday-Thursday: 8:30 a.m. to 6:00 p.m.

Friday: 8:30 a.m. to 8:00 p.m.

Weekends: 8:30 a.m. to 12:30 p.m.

Radiology - 8:00 a.m. to 4:30 p.m. (after hours, page Tech)

EKG - 7:00 a.m. to 3:45 p.m.