

## PROJECT 2

# MEDICAL CLINIC



### PROJECT HIGHLIGHTS

- Telephone log
- New patient record
- Appointment
- Checking a patient in
- Room booking
- Laboratory requisition
- X-ray requisition
- Faxing a prescription
- Sick note
- Receipt
- Appointment card
- Clinic evening schedule
- Email
- Website contacts
- Common abbreviations
- Project review
- Supplemental project tasks

A clinic is a general medical practice that is associated with physicians and other specialties related to medical care. Clinics are privately operated or publicly managed and funded. Medical clinics typically cover the healthcare needs of the local community.

Often a clinic will have many of the various services required for healthcare needs, from physicians to additional healthcare providers, such as dentists, chiropractors, physiotherapists, and massage therapists, working together for the wellness of their patients.

Your role in a clinic is to provide daily administrative support and general management of the day-to-day routines of all clinical specialists and patients. Patients arrive at the clinic with or without an appointment. The patients are your main priority—they are your clients. You are to treat each patient with respect, empathy, and patience.

In this project, you will be working for Dr. Kyle Thomas who is one of BMC's general practitioners.

## **TASK 1** Telephone Log

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RESOURCES: Appendix C – Voice Messages 1, 2, 3, 4, 5, 6, 7, and 8  
Appendix C – Telephone Log Template  
Appendix D – Telephone Log Sample  
Voice File Player (such as Media Player)

### **Instructions:**

Each medical environment handles incoming telephone calls in a different manner. Some use telephone message slips. Brooklane Medical Centre keeps an electronic telephone log and records the calls and the action taken. The log is used for messages left on the clinic's voice mail and calls taken in person.

- Listen to the eight voice messages found in the textbook electronic files.
- Transcribe the voice messages into your telephone log.
- Often, the patient voice messages will have missing information. When this occurs, you must refer to your patient spreadsheets (BMC or Student).

## **TASK 2** New Patient Record

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RESOURCES: Appendix B – Patients  
EMR System

### **Instructions:**

When a patient calls or comes to the clinic personally to arrange for an appointment, you must create a new patient record to enter the patient in the EMR system. This can be done by transferring information from a paper form the patient completes upon arrival.

Patient 2 called to see a specialist. Patient 2 went to the hospital for sutures on the right upper thigh caused by a rugby injury, but did not listen to the emergency physician and went back and played another match. Subsequently, Patient 2 popped a stitch and fell, sustaining an injury to the right hand and decreased mobility.

- Create a new patient record for Patient 2 in your EMR system using Patient 2's new patient information form for a BMC patient or the patient's information in your student spreadsheet.

## New Patient Information

Last Name Preferred Name	<i>Thomas</i>	First Name	<i>Lyle</i>			
Middle Name	<i>T</i>	Sex M <input type="checkbox"/> F <input type="checkbox"/>	DOB YYYY/MM/DD	<i>19xx/03/16</i>	Language	<i>English</i>
Maiden Name		HCN	<i>[?]</i>		Version	
Expiry Date YYYY-MM-DD	<i>[?]</i>	Alias				
Street Address	<i>108 Second Avenue</i>		City	<i>your city</i>	Province	<i>Your prov/terr</i>
Postal Code	<i>[?]2S 1C5</i>	Home No.	<i>[?]-592-1234</i>	Work No.	<i>none</i>	
Cell No.		Email	<i>LT@home.ca</i>			
Occupation	<i>Clerk</i>	Employer and Address	<i>Government of Canada 100 Oak Street, [city], [prov/terr] [?]2C 8H0</i>			
Pharmacy Name	<i>Willaway</i>	Address	<i>245 Stonehill Briar, [city], [prov/terr] [?]9C 7T5</i>			
Main Contact	<i>Stephanie Thomas</i>		Phone No.		Fax No.	
Next of Kin	<i>Stephanie Thomas</i>		Relationship	<i>Wife</i>	Phone No.	<i>[?]-592-0645</i>
Relative(s) in Clinic	<i>Cindy Thomas</i>		Relationship(s)	<i>Mother</i>	Phone No(s).	<i>[?]-592-1234</i>
Medications	<i>Vitamin D supplements Iron supplements</i>					
Allergies	<i>Grass</i>					
Current Medical Conditions	<i>High blood pressure Low iron levels</i>					
Family History of the Following:						
Diabetes		Cancer		Depression		Blood Disorders
High Blood Pressure		Glaucoma		Thyroid Problems		Heart Problems
Have you been hospitalized within the past year or had surgery? If so, please provide date.			<i>No</i>			
Additional medical information that would be helpful.						

### TASK 3 New Appointment

RESOURCE: EMR System

#### Instructions:

It is your responsibility to create appointments for patients.

- Create a new 15-minute appointment for Patient 2 to see Dr. Thomas at 2 p.m. Tuesday.

#### **TASK 4**    **Checking Patient In**

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RESOURCE: EMR System

**Instructions:**

You must check patients in when they arrive with a pre-arranged appointment or for an unscheduled visit.

Patient 2 arrived at the clinic for a scheduled appointment today to see if a repair could be done to the popped stitch as well as to have the hand examined.

- Using your EMR system, check Patient 2 in as arrived.

#### **TASK 5**    **Room Booking**

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RESOURCE: EMR System

**Instructions:**

Once patients are checked in, they must be assigned an examination room.

- Using your EMR system, schedule Patient 2 into Room 3.

#### **TASK 6**    **Laboratory Requisition**

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RESOURCES: Appendix B – Patients  
Appendix C – Laboratory Requisition Template  
Appendix C – Electronic Signatures  
Appendix D – Laboratory Requisition Sample

**Instructions:**

Laboratory requisitions ensure accurate processing of lab samples and the requisitions are unique to each province or territory. They must be completed entirely or may be returned to the healthcare provider.

Patient 2 was also feeling weak and tired. As a result, Dr. Thomas has decided to check the patient's iron and do a full blood examination.

- Using the laboratory requisition, request full blood (CBC) and iron (ferritin) tests.

#### **TASK 7**    **X-ray Requisition**

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RESOURCES: Appendix B – Patients  
Appendix C – X-ray Requisition Template  
Appendix D – X-ray Requisition Sample

**Instructions:**

An X-ray is a medical test that provides an image on a film or digitally. Patients who are possibly pregnant are discouraged from having an X-ray; the healthcare provider and the patient will make the determination.

Dr. Thomas has requisitioned an X-ray for Patient 2's right hand as a result of the fall.

- Using the X-ray requisition, request an X-ray for the right hand.

## TASK 8 Faxing a Prescription

RESOURCES: Appendix C – Fax Cover Sheet Template  
Appendix D – Fax Cover Sheet Sample

### Instructions:

Dr. Thomas would like to prescribe a new pain medication for Patient 2; however, the doctor would like to research a new drug and its associated contraindications with the patient's current medications and state of health.

Later in the day, Dr. Thomas provided you with a prescription for Patient 2 based on the information he researched on the new pain medication. He has asked you to call the patient and determine where to fax the prescription.

Healthcare providers can provide patients with paper prescriptions (either handwritten or printed from the facility's computer) or they can be directly faxed to the patient's pharmacy. The pharmacy must be able to determine the authenticity of the fax. At one time, a VOID watermark appeared on the faxed copy; however, faxes now contain a header identifying the transmitting facility.

Prescriptions can also be sent through a computerized prescription service to the pharmacy, or faxes can be sent directly from the facility's EMR system. These methods assist in eliminating fraudulent activity.

When preparing a fax cover sheet, never key in information pertaining to the patient, due to privacy regulations. This would include the patient's name, medical records number (MRN), health card number (HCN), and date of birth.

Patient 2 has identified the following pharmacy:

Rexall  
893 Johnson Avenue  
[your city], [your province or territory] [the first letter of your postal code]2B 9N6  
[your area code]-585-0999 (fax)

- Prepare a fax cover sheet to fax the prescription. Assume you are attaching the prescription.

## TASK 9 Sick Note

RESOURCES: Appendix B – Patients  
Appendix C – Sick Note Template  
Appendix D – Sick Note Sample

### Instructions:

Sick notes are required by organizations and educational institutions when the patient needs to be absent from work or school.

Patient 2 requires a sick note for a five-day absence from work commencing Tuesday.

- Prepare a sick note for Patient 2.
- Dr. Kyle Thomas is the healthcare provider issuing the sick note.

## TASK 10 Receipt

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RESOURCES: Appendix B – Patients  
Appendix C – Receipt Template  
Appendix D – Receipt Sample

### Instructions:

Receipts are provided once payment has been received for a service. Patients can pay by cheque, cash, credit card, Interac, or electronic funds transfer depending upon the clinic's preferences. If HST is charged, an HST number must appear on the receipt. If a patient is paying by credit card, the credit card number is never recorded on the receipt for security purposes.

### Instructions:

- BMC charges a \$20 fee for all sick notes issued, and HST is not applicable for this service.
- Prepare a receipt for the \$20 paid in cash by Patient 2.

## TASK 11 Appointment Card

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RESOURCES: Appendix B – Patients  
Appendix C – Appointment Card Template  
Appendix D – Appointment Card Sample

### Instructions:

Patients often wish to leave the clinic with an appointment card as a reminder of an upcoming appointment. Patients should be reminded of their appointments as per the clinic policy even though the patients leave the clinic with appointment cards.

- Complete an appointment card for Patient 2's follow-up appointment two weeks from today's appointment at 2 p.m. with Dr. Thomas.

## TASK 12 Clinic Evening Schedule

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RESOURCE: Project 1, Task 4

### Instructions:

Medical clinics operate after normal business hours. BMC has decided to expand its hours to accommodate the flu season.

- Revise the Project 1, Task 4, clinic schedule.
- Revise the following times:  
Wednesday and Thursday 8 a.m. to 9 p.m.  
Saturday 8 a.m. to 2 p.m.

**TASK 13** Email

RESOURCE: EMR System Email or Email Account

**Instructions:**

The medical team must be informed of all changes to the clinic schedule. An EMR system or work account can be used. You should never use your personal account for business purposes; however, for this task, you can use your own personal account unless you have an educational institution account.

- Send an email to all staff advising that the BMC schedule has been revised, and that it is posted on the employee bulletin board in the clinic staff lounge.

**TASK 14** Websites

RESOURCE: Websites Workbook

**Instructions:**

Health services assistants maintain a website spreadsheet containing useful resources for the clinic.

You may have to refer patients to other medical facilities.

- Using your Websites workbook created in Project 1, rename Sheet 3, Clinics, and Sheet 4, Pharmacies.
- Within the sheets, create the following centred column heads:
  - Name of Organization
  - URL (website address)
  - Purpose (reason that the clinic would use the information)
- Add the following websites:
  - Clinics
    - Appletree Medical Group
    - Two local clinics
  - Pharmacies
    - Shoppers Drug Mart
    - Rexall
    - IDA Pharmacy
    - One local pharmacy

**TASK 15**   **Abbreviations**

RESOURCE: Appendix C – Quizlet Flashcards

<https://quizlet.com/500503534/module-2-flash-cards/>

<https://quizlet.com/553043252/abbreviation-descriptions-module-2-flash-cards/>

**Instructions:**

Practise learning the following abbreviations in terms of the words and their meanings.

Abbreviation	Word	Meaning
#	number	Represents a measurement
/d	per day	A 24-hour unit of time
A, B, AB, O	blood grouping system	Blood grouping system used to identify the blood type—A, B, AB, and O—as positive or negative for antigens
AP	anterior/posterior	An order on an X-ray that provides direction to the technician
approx	approximately	No definite time frame
BMD	bone mineral density	The amount of minerals in the bones measured per square centimetre
BRP	bathroom privileges	The patient is on bed rest for medical reasons; however, patient is allowed to get out of bed to go to the bathroom
CAT	computerized axial tomography	Uses X-rays and a computer to produce cross-section images of a body part
CMA	Canadian Medical Association	A professional governing organization representing the physicians and surgeons in Canada
CPS	College of Physicians and Surgeons	Responsible for governance of physicians
CXR	chest X-ray	Uses low doses of radiation to produce an image on film or screen of the chest
DI	diagnostic imaging	Department that includes machines that help visualize inside the body
DOB	date of birth	The day, month, and year the patient or person was born
F	Fahrenheit	Temperature scale in degrees
f/u	follow up	Patient must be seen again for the same condition to continue care
FBS	fasting blood sugar	The amount of glucose in the system after fasting
FRCPC	Fellow of The Royal College of Physicians of Canada	A member of the regulatory body that a physician applies to after receiving an MD degree

Abbreviation	Word	Meaning
GB	gallbladder	Organ of the body that aids in digestion of fats and concentrates the bile for the body
Ht or ht	height	A measurement of how tall the patient is; used in mathematical calculations
KCl	potassium chloride	A chemical compound made up of potassium and chlorine; a type of salt
KUB	kidney, ureter, and bladder	Three parts of the urinary system
lab	laboratory	Facility that takes specimens from the patient's body and analyzes them; X-rays may be performed here as well
LAT	lateral	Directed toward the left or right side
LLQ	left lower quadrant	Lower left front or back of the torso
LOC	loss of consciousness	Interruption of awareness of self or surroundings
LUQ	left upper quadrant	Left upper front or back of the torso
M	metre	A measure of length in the International System of Units (SI) or metric system
mammo	mammography	X-ray of the breasts to detect any abnormalities
MMR	measles, mumps, rubella	A group of diseases that usually affect children; Canada has a vaccine that protects against these diseases
mon	monthly	A unit of time
MRI	magnetic resonance imaging	Medical imaging technique used to visualize the body's internal structure or organs; uses a magnetic field
MSU	mid-stream urine	During urination, the urine which exits the bladder half way during the stream
NPO	nothing per mouth or nothing by mouth	No food or drink by mouth in preparation for a test or surgery
O <sub>2</sub>	oxygen	Life-supporting component of the air we breathe; a chemical element on the periodic table
OPD	outpatient department	A medical facility dealing with medical issues outside of the in-patient area of the hospital
Pap	Papanicolaou test/smear	Test of the cells in the endocervical canal of the female
PET	positron emission tomography	Nuclear medicine test that produces three-dimensional images
RN	Registered Nurse	A graduate with a Bachelor of Nursing degree who has successfully undertaken the national nursing registration examination for licensing in a province or territory; registered with the Canadian Nurses Association (CNA); provides direct patient care

Abbreviation	Word	Meaning
RPN	Registered Practical Nurse	A graduate of an approved practical nursing program who has successfully undertaken the Canadian Practical Nurse Registration Examination by the College of Nurses of Ontario; registered with the Canadian Council for Practical Nurse Regulators (CCPNR); works under the direction of a Registered Nurse (RN); equivalent to a Licensed Practical Nurse (LPN)
RLQ	right lower quadrant	Right lower front or side of the torso
RUQ	right upper quadrant	Right upper front or back of the torso
TPR	temperature, pulse, respiration	An action performing all three units of measurements
UA	urinalysis	Test done on urine using a microscope
UGI	upper gastrointestinal series	Diagnostic imaging test that views the esophagus, stomach, and duodenum
U/S	ultrasound	Test that uses sound waves to produce pictures of the internal body structures
wk	week	Unit of time that is made up of seven days

## TASK 16 Theory Questions

### True or False

- Sick notes are uninsured services, and they are provided free of charge.  
True or False
- Appointment cards are provided as a reminder for the patient, and when one is provided, the health services assistant does not need to confirm the appointment with the patient.  
True or False
- Medical offices may use their EMR email for internal communication.  
True or False
- A telephone log is a method of recording incoming calls to ensure action is taken.  
True or False
- A laboratory requisition is only used for CBCs.  
True or False
- An X-ray requisition queries whether the patient is possibly pregnant.  
True or False
- A faxed prescription must contain the medical facility contact information in the header for authentication.  
True or False

8. A receipt must contain an HST number if HST is charged.

True or False

9. A receipt never displays a patient's credit card number.

True or False

10. Checking a patient in means the patient has confirmed the appointment.

True or False

**Short Answer**

1. Describe the process of checking a patient in.

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2. What is an X-ray?

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3. What requisition is used to test blood?

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4. What do you do when a patient does not provide a phone number when leaving a message?

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5. List the minimum information required when creating a new patient record.

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## **TASK 17** Supplemental Project Tasks

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### **1. Alternative Clinics**

Your physicians would like to provide an additional location for patients to go when our clinic is unavailable.

Research a facility in your city that BMC patients could use.

Create a table including:

- Name of clinics
- Address of clinics
- Hours of operation
- Services available onsite

Include the URL under the table.

### **2. Christmas Party**

Dr. Thomas is chairing the committee to organize the staff Christmas party. You have been asked to help Dr. Darby in the planning.

Dr. Thomas has asked you to find a local venue that will accommodate 50 people. The party will be in the evening and will include a hot buffet meal.

Create a table with your findings:

- Name of venue
- Address
- Phone number
- Website
- Suggested dinner menu
- Cost per person