



Committee on Interdisciplinary Practice

STANDARDIZED PROCEDURE – NURSE PRACTITIONER / PHYSICIAN ASSISTANT

PREAMBLE

Title: Combined ZSFG Psychiatry

I) Policy Statement

- A) It is the policy of San Francisco General Hospital and Trauma Center that all standardized procedures are developed collaboratively and approved by the Committee on Interdisciplinary Practice (CIDP) whose membership consists of Nurse Practitioners, Nurse Midwives, Physician Assistants, Pharmacists, Registered Nurses, Physicians, and Administrators and must conform to all eleven steps of the standardized procedure guidelines as specified in Title16, CCR Section 1474.
- B) All standardized procedures are to be kept in a unit-based manual. A copy of these signed procedures will be kept in an operational manual in the locations listed below ~~SFGH Department of Psychiatry Nursing Office, Operational Manual in the PES staff room, OTOP Medical Director's office, Community Focus Program at 930 Market Street, the Social Work Office on Ward 86, the Positive Health Program, the Alliance Health Project at 1930 Market Street and the ED Case Management Nurse Practitioner office~~ and on file in the Medical Staff Office-; Chief, ZSFG Psychiatry Office and ZSFG, Director of Nursing Office.

<u>Division</u>	<u>Program/Location</u>
<u>Acute and Emergency Services</u>	<u>Psychiatric Emergency Services (PES), bldg 5 PES Staff room</u>
-	<u>Inpatient Service , bldg 5, 7B/7C, Chart room</u>
-	<u>Consult/Liaison bldg 5, Director's office</u>
<u>Alliance Health Project (AHP)</u>	<u>1930 Market St, Medical Director's office</u>
-	<u>Positive Health Program, bldg 80 Ward 86 Social Work Office</u>
<u>Citywide Case Management</u>	<u>982 Mission St, Medical Director's office</u>
-	<u>Emergency Department Case Management bldg 80, Ward 82, Nurse Practitioner's office</u>
<u>Substance Abuse and Addiction Medicine</u>	<u>Opiate Treatment Outpatient Program (OTOP) bldg 90, Ward 93</u>
-	<u>Office-based Buprenorphine Induction Clinic (OBIC) 1380 Howard Street, 2nd floor</u>
-	<u>Stimulant Treatment Outpatient Program (STOP) 982 Mission St.</u>
-	<u>Substance Abuse Research Project (SARP) bldg 20, Ward 21</u>
<u>Trauma Recovery Services</u>	<u>Child and Adolescent Support Advocacy and Resource Center (CASARC) Ward 80; MED (bldg 25) ; Child Advocacy Center(CAC) 3450 3rd St. # 300</u>
-	<u>Rape Treatment Center (RTC) 2727 Mariposa Street; MED (bldg 25)</u>
<u>Jail Behavioral Health Services</u>	<u>850 Bryant St, San Francisco</u>

II) Functions To Be Performed

~~Substance Abuse Services~~

Each practice area will vary in the functions that will be performed, such as primary care in a clinical, specialty clinic care setting or inpatient care in a unit-based hospital setting.

A Nurse Practitioner (NP) is a Registered Nurse who has additional preparation and skills in physical diagnosis, psychosocial assessment, and management of health-illness; and who has met the requirements of Section 1482 of the Nurse Practice Act. Nurse Practitioners provide health care, which involves areas of overlapping practice between nursing and medicine. These overlapping activities require standardized procedures. These standardized procedures include guidelines stating specific conditions requiring the Nurse Practitioner to seek physician consultation.

Physician assistants (PA) are health care providers licensed to practice medicine with physician supervision and who have attended and successfully completed an intensive training program accredited by the Accreditation Review Commission on education for the Physician Assistant (ARC-PA). Upon graduation, physician assistants take a national certification examination developed by the National Commission on Certification of PAs in conjunction with the National Board of Medical Examiners. To maintain their national certification, PAs must log 100 hours of continuing medical education every two years and sit for a recertification examination every six years. Graduation from an accredited physician assistant program and passage of the national certifying exam are required for state licensure. While functioning as a member of the Community Health Network, PAs perform health care-related functions under physician oversight and with the utilization of standardized procedures and Delegation of Services Agreement (documents supervising agreement between supervising physician and PA).

The NP/PA conducts physical exams, diagnoses and treats illnesses, orders and interprets tests, counsels on preventative health care, performs invasive procedures and furnishes medications/issue drug orders as established by state law.

III) Circumstances Under Which NP/PA May Perform Function

A) Setting

- 1) Location of practice is in various locations at ZSFG, including: Psychiatric Emergency Services, psychiatry inpatient units, outpatient clinics, and the medical emergency department room as well as, other community based clinics, and in the client's home as needed.
- 2) Role in each setting may include management of primary, acute and chronic medical and psychiatric conditions, hospital and PES admissions and discharges; emergency psychiatry consultation and facilitating community residential treatment program admissions and discharges.

B) Supervision

- 1) Overall Accountability:
The NP/PA is responsible and accountable to the Department of Psychiatry Deputy Chief, Medical Director, designated supervising physicians on units or clinics or attending; and other supervisors as applicable.

- 2) A consulting physician will be available to the NP/PA by phone, in person, or by other electronic means at all times.
- 3) Physician consultation is to be obtained as specified in the protocols and under the following circumstances:
 - (a) Acute decompensation of patient situation;
 - (b) Problem that is not resolved after reasonable trial of therapies.
 - (c) Unexplained physical, psychiatric, or laboratory findings;
 - (d) Upon request of patient, affiliated staff, or physician;
 - (e) Initiation or change of medication other than those in the formulary (ies).
 - (~~e~~)(f) Problem requiring unexpected hospital admission or potential unexpected hospital admission.
 - (g) Acute, severe respiratory distress.
 - (~~f~~)(h) An adverse response to respiratory treatment, or a lack of therapeutic response.

IV) Scope of Practice – Protocols

- 1) Health Care Management: Acute/Urgent Care
- 2) Health Care Management: Primary Care (OTOP Program only)
- 3) Health Care Management: Substance Abuse
- 4) Furnishing Medications/Drug Orders
- 5) Discharge of Inpatients
- 6) Procedure: Waived Testing

V) Requirements for the Nurse Practitioner /Physician Assistant

A) Basic Training and Education

- 1) Active California Registered Nurse/Physician Assistant license.
- 2) Successful completion of a program, which conforms to the Board of Registered Nurses (BRN)/Accreditation Review Commission on Education for the Physician Assistant (ARC)-PA standards.
- 3) Maintenance of Board Certification from American Nurses Credentialing Center (ANCC), (NP)/National Commission on the Certification of Physician Assistants (NCCPA) certification.
- 4) Maintenance of certification of Basic Life Support (BLS) that must be from an American Heart Association provider.
- 5) Possession of a National Provider Identifier or must have submitted an application.
- 6) Copies of licensure and certificates must be on file in the Medical Staff Office.
- 7) Furnishing Number and DEA number if applicable.
- 8) Physician Assistants are required to sign and adhere to the San Francisco General Hospital and Trauma Center Delegation of Service Agreement (DSA). Copies of DSA must be kept at each practice site for each PA.

B) Specialty Training

- 1) Specialty requirements: Adult Nurse Practitioner, Family Nurse Practitioner, or Psychiatric Mental Health Nurse Practitioner {are —required to practice in Psychiatric Emergency Service}.
- 2) Academic and clinical training in the field of psychiatric/mental health, including psychiatric and substance use assessments and psychiatric care planning that is equivalent to that of the Psychiatric NP.
- 3) All Affiliated Staff who will participate in the Buprenorphine protocol must have completed on the job training by a certified physician provider within one month

of employment.

VI) Evaluation

- A) Evaluation of NP/PA Competence in performance of standardized procedures.
- 1) Initial: at the conclusion of the standardized procedure training, the Medical Director, Medical Manager and/or designated physician and other supervisors will assess the NP/PA's ability to practice.
 - (a) Clinical Practice
 - (i) Length of proctoring period will be up to three months.
 - (ii) The evaluator will be the Medical Director and/or designated supervising physicians as applicable.
 - (iii) The method of evaluation in clinical practice will be five clinical reviews, including chart reviews and/or direct observation upon initial appointment. Each protocol [that is relevant to a specific program \(#1-56\)](#) must be represented in a minimum of two reviews with the exception of Psychiatric NP's working in the Psychiatry Emergency Service who, in addition to the requirement above, will require a minimum of 5 concurrent clinical reviews that include the decision to release a patient from a 5150 hold.
 - 2) Follow-up: areas requiring increased proficiency as determined by the initial or annual evaluation will be re-evaluated by the Medical Director, and/or designated physician, at appropriate intervals.
 - 3) Ongoing Professional Performance Evaluation (OPPE):
Every six months, affiliated staff will be monitored for compliance to department specific indicators and reports will be sent to the Medical Staff Office.
 - 4) Biennial Reappointment: Medical Director and/or designated physician must evaluate the NP/PA's clinical competence as noted in attached Proctoring and Reappointment Grid. This includes 4 chart reviews every two years.
 - 5) Physician Assistants:
 - (a) Physician Assistants have 3 forms of supervision. Their Delegation of Service Agreement will note which form of supervision will be used. These methods are: 1) examination of the patient by supervising physician the same day as care is given by the PA, 2) supervising physician shall review, audit and countersign every medical record written by PA within thirty (30) days of the encounter, 3) supervising physician shall review, sign and date the medical records of at least five percent (5%) of the patients managed by the PA within 30 days of the date of treatment under protocols which shall be adopted by supervising physician and PA, pursuant to section 1399.545 (e) (3) of the Physician Assistant Regulations. Protocols are intended to govern the performance of a PA for some or all tasks. Protocols shall be developed by the supervising physician, adopted from, or referenced to, text or other sources. Supervising physicians shall select for review those cases which by diagnosis, problem, treatment or procedure represent in his/her judgment, the most significant risk to the patient.

VII) Development and Approval of Standardized Procedure

A) Method of Development

- 1) Standardized procedures are developed collaboratively by the Nurse Practitioners/Physician Assistants, Nurse Midwives, Pharmacists, Physicians, and Administrators and must conform to the eleven steps of the standardized procedure guidelines as specified in Title 16, CCR Section 1474.

B) Approval

- 1) The CIDP, Credentials, Medical Executive and Joint Conference Committees must approve all standardized procedures prior to their implementation.

C) Review Schedule

- 1) The standardized procedure will be reviewed every three years by the NP/PA and the Medical Director and as practice changes.

D) Revisions

- 1) All changes or additions to the standardized procedures are to be approved by the CIDP accompanied by the dated and signed approval sheet.

| [Continued on next page.](#)

Protocol #1: Health Care Management – Acute/Urgent Care

A) Definition

This protocol covers the procedure for patient visits for urgent medical, substance abuse and/or psychiatric problems, which include but are not limited to common acute problems, uncommon, unstable, or complex conditions at OTOP and OBIC, STOP, ~~Community Focus, Citywide Case Management AIDS Alliance~~ Health Project, Inpatient Units, PES, CRT and other community outreach programs.

Commented [BS1]: OBIC, STOP? These are two separate programs.

B) Database

1) Subjective Data

- (a) History and review of symptoms relevant to the presenting complaint and/or disease process.
- (b) Pertinent past medical/surgical/psychiatric history, substance use, family history, psychosocial and occupational history, hospitalizations/injuries, current medications, allergies, and treatments.

2) Objective Data

- (a) Physical exam and/or mental status exam if appropriate to presenting symptoms.
- (b) Laboratory and imaging evaluation, as indicated, relevant to history and exam.
- (c) All Point of Care Testing (POCT) will be performed according to the ~~SFGL~~ POCT policy and procedure 16.20.

C) Diagnosis

Assessment of data including current DSM_-diagnostic criteria for Psychiatric Disorders and Substance Dependence/Withdrawal based on the subjective and objective findings to identify disease processes. May include statement of current status of disease.

D) Plan

1) Therapeutic Treatment Plan

- (a) Diagnostic tests for purposes of disease identification.
- (b) Initiation or adjustment of medication per Furnishing/Drug Orders protocol.
- (c) Referral to physician, specialty clinics, and supportive services, as needed.
- (d) Admission to PES and inpatient psychiatry
- (e) Discharge from PES
- (f) Placement and discontinuation of 5150 LPS hold in PES and the ED.

2) Patient conditions requiring Attending Consultation

- (a) Acute decompensation of patient situation
- (b) Problem that is not resolved after reasonable trial of therapies
- (c) Unexplained historical, physical or laboratory findings
- (d) Uncommon, unfamiliar, unstable, and complex patient conditions
- (e) Upon request of patient, NP, PA, or physician
- (f) Initiation or change of medication other than those in the formularies.

(g) Any problem requiring unexpected hospital admission or potential unexpected hospital admission.

3) Education

(a) Patient education should include treatment modalities, discharge information and instructions

4) Follow-up

As appropriate regarding patient health status and diagnosis.

E) Record Keeping

All information from patient visits will be recorded in the medical record and/or electronically in the relevant Electronic Health Record, including eClinical Works (Ward 86), ARIES or Avatar (AHP), LCR and/or Methasoft and/or PES eChart. For physician assistants, using protocols for supervision, the supervising physician shall review, countersign and date a minimum sample of five (5%) sample of medical records of patients treated by the physician assistant within thirty (30) days. The physician shall select for review those cases which by diagnosis, problem, treatment or procedure represent in his/her judgment, the most significant risk to the patient.

Protocol #2: Health Care Management – Primary Care (OTOP Program only)

A) Definition

This protocol covers the procedure for appropriate health care management in primary care, psychiatric care and substance abuse services. Scope of care includes health care maintenance and promotion and care of chronic stable illnesses.

B) Database

1) Subjective Data

- (a) Screening: appropriate history that includes but is not limited to: past medical history, surgical history, hospitalizations/injuries, habits, family history, psychiatric history, psychosocial history, allergies, current medications, treatments, and review of systems.
- (b) Ongoing/Continuity: review of symptoms and history relevant to the disease process or presenting complaint.
- (c) Pain history to include onset, location, and intensity.

2) Objective Data

- (a) Physical exam consistent with history and clinical assessment of the patient.
- (b) Mental status examination
- (c) Laboratory and imaging evaluation, as indicated, relevant to history and exam.
- (d) All Point of Care Testing (POCT) will be performed according to the [SFGHMC-ZSFG](#) POCT policy and procedure 16.20.

C) Diagnosis

Assessment of data from the subjective and objective findings identifying risk factors and disease processes. May include a statement of current status of disease (e.g. stable, unstable, uncontrolled).

D) Plan

1) Treatment

- (a) Appropriate screening tests and /or diagnostic tests for purposes of disease identification.
- (b) Initiation or adjustment of medication per Furnishing/Drug Orders protocol.
- (c) Immunization update.
- (d) Referral to specialty clinics and supportive services as needed.

2) Patient conditions requiring Attending Consultation

- (a) Acute decompensation of patient situation
- (b) Problem that is not resolved after reasonable trial of therapies
- (c) Unexplained historical, physical or laboratory findings
- (d) Upon request of patient, NP, PA, or physician
- (e) Initiation or change of medication other than those in the formulary/ies.
- (f) Problem requiring hospital admission or potential hospital admission.

3) Education

- (a) Patient education appropriate to diagnosis including treatment modalities and lifestyle counseling (e.g. diet, exercise).
- (b) Anticipatory guidance and safety education that is age and risk factor appropriate.

4) Follow-up

As indicated and appropriate to patient health status and diagnosis.

E) Record Keeping

All information relevant to patient care will be recorded in the medical record (e.g.: admission notes, progress notes, procedure notes, discharge notes). For physician assistants using protocols for supervision, the supervising physician shall review, countersign and date a minimum of five (5%) sample of medical records of patients treated by the physician assistant within thirty (30) days. The physician shall select for review those cases which by diagnosis, problem, treatment or procedure represent in his/her judgment, the most significant risk to the patient.

Protocol #3: Health Care Management – Substance Abuse

A) Definition

This protocol covers the procedure for appropriate health care management in primary care, psychiatric care, and substance abuse services provided at OTOP and /or 1380 Howard Street San Francisco, Ca 94103) and inpatient units (4th, 5th, 6th, 7th floors) of the [Zuckerberg](#) San Francisco General Hospital and Trauma Center.

This protocol also covers the procedure for appropriate intake history and physical for patients who meet diagnostic criteria for substance dependence / withdrawal seeking medical treatment for the following outpatient programs: Opiate Treatment Outpatient Program (OTOP), Substance Abuse Research Project (SARP) and Office-Based Induction Clinic (OBIC) and Stimulant Treatment Outpatient Program (STOP).

Scope of care includes substance detoxification and maintenance treatments, health care promotion and maintenance treatment, management of common acute medical and/ or psychiatric illness and chronic stable conditions.

As an accredited and licensed Narcotic Treatment Program, OTOP provides both short/long term methadone detoxification and maintenance treatment to meet patient needs.

Methadone Maintenance as defined in 21 CFR 291.505 “the dispensing of a narcotic drug at a relatively stable dosage levels in the treatment of an individual for dependence on heroin or other morphine-like drugs.”

Methadone Detoxification as defined in 21 CFR 291.505 “the dispensing of narcotic drug in decreasing doses to an individual to alleviate adverse physiological or psychological effects incident to withdrawal from continuous or sustained use of a narcotic drug and as a method of bringing the individual to a narcotic drug-free state within such period.”

On 9/21/01, the California Department of Alcohol and Drug Programs issued a change in policy to allow for Long term Methadone Detoxification Programs in California in order to fulfill treatment needs of patients with significant substance use and psychosocial issues.

“Long term detoxification is a period of more than 30 days but not in excess of 180 days.”

“Short term detoxification is for a period not in excess of 30 days.”

OBIC uses ~~Buprenorphine (Subutex or Suboxone), and buprenorphine/naloxone~~ a pharmaceutical agent used only for opioid replacement in the treatment of patients with opioid dependence. For buprenorphine induction and management, all orders for buprenorphine, initial as well as subsequent, come from the ~~DEA-waived MD, PA or NP, practitioners with the DATA-waiver.~~

EXCLUSION CRITERIA for this protocol include: over sedation, altered

Commented [BS2]: Would recommend using generic names here: buprenorphine and buprenorphine/naloxone.

Commented [BS3]: or

Commented [JK4]: CIDP recommended change in this language “MD with X-license and DEA-waived PA or NP” after reviewing DEA website

Commented [JK5R4]: OBIC NP has DEA “X” license; wording DEA-waived MD, NP or PA with “X” license

Commented [JK6]: Wording approved by Credentials Committee and Brad Shapiro agreed to this change

mental status, assaultive/threatening behavior, and current suicidal/homicidal ideation.

Opioid withdrawal may exacerbate existing medical/psychiatric conditions. NP/PA/MD's collaborate in assessing and managing these conditions through the use of standardized protocols.

B) Database

1) Subjective Data

Substance Use: document history of at least one year of substance addiction: include type of current substance use (amount per day), frequency, route, method of use, most recent use (date and time), assess current substance withdrawal symptoms

- (a) Screening: appropriate history that includes but is not limited to: past medical/surgical history, psychiatric history, domestic violence, hospitalizations/injuries, current medications, allergies, and treatments.
- (b) On-going/continuity: chief complaint, review of pertinent systems and history relevant to the disease process or presenting complaint.
- (c) Pain history to include onset, location and intensity

2) Objective Data

- (a) Physical exam consistent with history and clinical assessment of the patient including psychiatric evaluation if appropriate to presenting symptoms.
 - (i) For patients seeking opiate treatment, emphasis on signs of opiate withdrawal (pupillary size, lacrimation, rhinorrhea, yawning, diaphoresis, piloerection, restlessness, presence of needle tracks, scar from prior incision and drainage of skin abscess due to intravenous / intramuscular drug use).
 - (ii) Assessment of possible substance intoxication, including but not limited to alcohol odor, nystagmus, positive Romberg test, clonus disinhibition, or other altered mental status.
- (b) Laboratory and imaging evaluation, as indicated, relevant to history and exam including the following:
 - (i) drug toxicology screening test
 - (ii) urine HCG screening for female patients of child bearing potential
- (c) All Point of Care Testing (POCT) will be performed according to the SFGHMC-ZSFG POCT policy and procedure 16.20.

C) Diagnosis

Assessment of data including the current DSM5 diagnostic criteria for Psychiatric Disorders and Substance Dependence / Withdrawal based on the subjective and objective findings identifying risk factors and disease processes. May include statement of current status of disease (e.g. stable, unstable, uncontrolled).

D) Plan

1) Treatment

- (a) Appropriate screening tests and/or diagnostic tests for purposes of disease identification.
- (b) Initiation or adjustment of medication per Furnishing/Drug Orders protocol with the exception of:
 - (i) Controlled Substance II (Methadone)Buprenorphine, Buprenorphine/Naloxone and Methadone, dose induction, adjustment discontinuation and/or renewal within an Opiate Treatment Program is

consistent with State and Federal guidelines

- (c) Immunization update.
 - (d) Referral to specialty clinics and supportive services, as needed.
- 2) Patient conditions requiring Attending Consultation
- (i) Acute decompensation of patient situation
 - (ii) Problem that is not resolved after reasonable trial of therapies including persistent opioid withdrawal symptoms intractable to subsequent methadone dose adjustment.
 - (iii) Unexplained historical, physical or laboratory findings
 - (iv) Upon request of patient, NP, PA, or physician
 - (v) Initiation or change of medication other than those in the formulary/ies.
 - (vi) Problem requiring hospital admission or potential hospital admission.
- 3) Education
- (a) Patient education appropriate to diagnosis including treatment modalities and lifestyle counseling (e.g. diet, exercise).
 - (b) Anticipatory guidance and safety education that is age and risk factor appropriate.
 - (c) Emphasis on harm reduction and safety
- 4) Follow-up
As indicated and appropriate to patient health status and diagnosis.
- E) Record Keeping
All information relevant to patient care will be recorded in the medical record and/or electronically in the LCR and/or Methasoft.
For physician assistants using protocols for supervision, the supervising physician shall review, countersign and date a minimum of five (5%) sample of medical records of patients treated by the physician assistant. The physician shall select for review those cases which by diagnosis, problem, treatment or procedure represent in his/her judgment, the most significant risk to the patient.

Commented [BS7]: This needs to be updated. Consider, "Buprenorphine, Buprenorphine/Naloxone and Methadone dose induction, adjustment, discontinuation and/or renewal within an Opiate Treatment Program is consistent with State and Federal guidelines."

Protocol #4: Furnishing Medications/Drug Orders

A) Definition

“Furnishing “of drugs and devices by nurse practitioners is defined to mean the act of making a pharmaceutical agent/s available to the patient in accordance with a standardized procedure. A “drug order” is a medication order issued and signed by a physician assistant. Physician assistants may issue drug orders for controlled substances Schedule II -V with possession of an appropriate DEA license. All drug orders for controlled substances shall be approved by the supervising physician for the specific patient prior to being issued or carried out. Alternatively, PAs may prescribe controlled substances without patient specific approval if they have completed education standards as defined by the Physician Assistant Committee. A copy of the Certificate must be attached to the physician assistants Delegation of Service document. Nurse practitioners may order Schedule II - V controlled substances when in possession of an appropriate DEA license. Schedule II - III medications for management of acute and chronic illness need a patient specific protocol. The practice site Psychiatric Services, scope of practice of the NP/PA, as well as Service Chief or Medical Director, determine what formulary/ies will be listed for the protocol. The formulary/ies to be used include: San Francisco General Hospital and Trauma Center/Community Health Network, Community Behavioral Health Services, Laguna Honda Hospital, Jail Health Services, San Francisco Health Plan, Medi-Cal and AIDS Drug Assistance Program. This protocol follows CHN policy on Furnishing Medications (policy no. 13.2) and the writing of Drug Orders. (Policy no.13.5).

B) Database

1) Subjective Data

- (a) Appropriate history and review of symptoms relevant to the presenting complaint or disease process to include current medication, allergies, current treatments, and substance abuse history.
- (b) Pain history to include onset, location, and intensity.

2) Objective Data

- (a) Physical exam consistent with history and clinical assessment of the patient.
- (b) Describe physical findings that support use for CSII-III medications.
- (c) Laboratory and imaging evaluation, as indicated, relevant to history and exam.
- (d) All Point of Care Testing (POCT) will be performed according to the [SFCH ZSFG](#) POCT policy and procedure 16.20. OBIC clinic has their own CLIA License and uses CLIA waived POCT for pregnancy and toxicology testing.

C) Diagnosis

Assessment of data including current DSM diagnostic criteria for Substance Use Disorders/Withdrawal syndromes based upon the subjective and objective findings identifying disease processes, results of treatments, and degree of pain and/or pain relief.

D) Plan

1) Treatment

- (a) Initiate, adjust, discontinue, and/or renew drugs and devices. Obtain informed consent for psychiatric medications as indicated.

- (i) Respiratory medications and treatments will be written based on the assessment from the history and physical examination findings and patient response to prior or current treatment.
- (ii) Nurse Practitioners may order Schedule II - III controlled substances for patients with the following patient specific protocols. These protocols may be listed in the patient chart, in the medications sections of the LCRelectronic medical record, or in the Medication Administration Record (MAR). The protocol will include the following:
 - location of practice
 - diagnoses, illnesses, or conditions for which medication is ordered
 - name of medications, dosage, frequency, route, and quantity, amount of refills authorized and time period for follow-up.

For Methadone and Buprenorphine Induction and management to treat Opiate dependence/withdrawal in a Narcotic Treatment Program (NTP) refer to CCR (Title 9) and CFR.

For Buprenorphine or Buprenorphine/Naloxone (Subutex/Suboxone) Induction and management, all orders for buprenorphine, initial as well as subsequent, come from the DEA-waived MD, PA or NP, practitioners with the DATA-waiver.
- (iii) To facilitate patient receiving medications from a pharmacist provide the following:
 - name of medication
 - strength
 - directions for use
 - name of patient
 - name of prescriber and title
 - date of issue
 - quantity to be dispensed
 - license no., furnishing no., and DEA no. if applicable

(b) Informed Consent for Psychiatric Medications

The NP/PA is authorized to provide patients with information regarding psychiatric conditions, the likely effects and possible side effects of psychiatric medications and alternative treatments, in order to obtain informed consent from the patient according to department guidelines.

2) Patient Conditions requiring Consultation

- (a) Problem which-that is not resolved after reasonable trial of therapies.
- (b) Initiation or change of medication other than those in the formulary.
- (c) Unexplained historical, physical or laboratory findings.
- (d) Upon request of patient, NP, PA, or physician.
- (e) Failure to improve pain and symptom management.

3) Education

- (a) Instruction on directions regarding the taking of the medications in patient's own language.
- (b) Education on why medication was chosen, expected outcomes, side effects, and precautions.

4) Follow-up

- (a) As indicated by patient health status, diagnosis, and periodic review of treatment course.

Commented [BS8]: Again, would recommend using generic names not trade names.

Commented [BS9]: or

Commented [JK10R9]: DEA-waived MD, NP or PA with "X" license

Commented [JK11R9]: Credentials approved wording

Commented [JK12]: CIDP wording

E) Record Keeping

All medications furnished by NPs and all drug orders written by PAs will be recorded in the medical record\LCR\MAR as appropriate. The medical record of any patient cared for by a PA for whom the supervising physician and surgeon's schedule II drug order has been issued or carried out shall be reviewed and countersigned and dated by a supervising physician and surgeon within seven (7) days.

Protocol #5: Discharge of Inpatients

A) ~~Definition~~Definition

This protocol covers the discharge of psychiatric inpatients from [Zuckerberg](#) San Francisco General Hospital and Trauma Center. Direction to discharge a patient will come from the attending physician.

B) Database

1) Subjective Data

(a) Review: health history and current health status

2) Objective Data

- (a) Physical exam consistent with history and clinical assessment of the patient.
- (b) Review medical record: in-hospital progress notes, consultations to assure follow-through.
- (c) Review recent laboratory and imaging studies and other diagnostic tests noting any abnormalities requiring follow-up.
- (d) Review current medication regimen, as noted in the MAR (Medication Administration Record).

C) Diagnosis

Review of subjective and objective data and medical diagnoses, ensure that appropriate treatments have been completed, identify clinical problems that still require follow-up and ensure that appropriate follow-up appointments and studies have been arranged.

D) Plan

1) Treatment

- (a) Review treatment plan with patient and/or family.
- (b) Initiation or adjustment of medications per Furnishing/Drug Orders protocol.
- (c) Assure that appropriate follow-up arrangements (appointments/studies) have been made.
- (d) Referral to clinical psychopharmacologist as indicated.
- (e) Referral to physician, specialty clinics and supportive services as needed.
- (f) Discontinue psychiatric legal holds.

2) Patient conditions requiring Attending Consultation

- (a) Acute decompensation of patient situation.
- (b) Unexplained history, physical or laboratory findings.
- (c) Upon request of patient, NP, PA or physician.
- (d) Initiation or change of medication other than those in the formulary.

3) Education

- (a) Review inpatient course and what will need follow-up.
- (b) Provide instructions on:
 - (i) follow-up clinic appointments
 - (ii) -outpatient laboratory/diagnostic tests
 - (iii) -discharge medications
 - (iv) -signs and symptoms of possible complications

4) Follow-up

- (a) Appointments
- (b) Copies of relevant paperwork will be provided to patient.

E) Record Keeping

All information from patient hospital stay will be recorded in the medical record for physician assistants, using protocols for supervision. The supervising physician shall review, countersign and date a minimum of five (5%) sample of medical records of patients treated by the physician assistant within thirty (30) days. The physician shall select for review those cases which by diagnosis, problem, treatment or procedure represent in his/her judgment the most significant risk to patients.

Protocol #6 - Procedure: Waived Testing

A) Definition

Waived testing relates to common laboratory tests that do not involve an instrument and are typically performed by providers at the bedside or point of care.

- 1) Location where waived testing is to be performed: any in- or outpatient location providing emergency or primary care.
- 2) The following non-instrument based waived tests are currently performed at [SFGH ZSFG](#):
 - (a) Fecal Occult Blood Testing (Hemocult ®)
Indication: Assist with detection or verification of occult blood in stool.
 - (b) Vaginal pH Testing (pH Paper)
Indication: Assist with assessment for ruptured membranes in pregnancy, bacterial vaginosis and trichomonas.
 - (c) SP® Brand Urine Pregnancy
Indication: Assist with the diagnosis of pregnancy.
 - (d) Chemstrip® Urine Dipstick
Indication: Assist with screening for and monitoring of kidney, urinary tract and metabolic diseases.
 - (e) [Urine Drug Screen](#); [Assist with the detection of drugs in urine.](#)

Commented [BS13]: Track Changes not working. I made a change here.

B) Database

- 1) Subjective Data
Rationale for testing based on reason for current visit, presenting complaint or procedure/surgery to be performed
- 2) Objective Data
Each waived test is performed in accordance with approved [SFGH ZSFG](#) policies and procedures specific for each test as well as site-specific protocols and instructions for:
 - (a) Indications for testing
 - (b) Documentation of test results in the [medical record](#) or [LCR](#)
 - (c) Actions to be taken (follow-up or confirmatory testing, Attending consultation, referrals) based on defined test results.
 - (d) Documentation or logging of tests performed

Commented [JK14]: To include current documentation new EPIC suggesting general term to cover

C) Diagnosis

Waived tests may serve as an aid in patient diagnosis but should not be the only basis for diagnosis.

D) Plan

- 1) Testing
 - (a) Verify patient ID using at least two unique identifiers: full name and date of birth (DOB) or Medical Record Number (MRN)
 - (b) Use gloves and other personal protective equipment, as appropriate.
 - (c) Assess/verify suitability of sample, i.e., sample should be fresh or appropriately preserved, appropriately timed, if applicable (for example first morning urine), and must be free of contaminating or interfering substances.

Samples not tested in the presence of the patient or in situations where specimen mix-up can occur, must be labeled with patient's full name and

DOB or MRN.

(d) Assess/verify integrity of the test system. Have tests and required materials been stored correctly and are they in-date? Have necessary controls been done and come out as expected?

2) Test Results requiring Attending Consultation

(a) Follow established site-specific protocols or instructions. When in doubt, consult responsible attending physician.

3) Education

(a) Inform patient of test results and need of additional tests, as necessary

4) Follow-up

Arrange for repeat or additional testing, as appropriate.

E) Record Keeping

Test and control results will be recorded in the medical record as per site-specific protocols (may be in paper charts or entered in electronic data bases). A record of the test performed will be documented in a log, unless the result entry in the medical record permits ready retrieval of required test documentation.

1) Summary of Prerequisites, Proctoring and Reappointment Competency

Prerequisites: Certification as midlevel practitioner practicing within one of the six medical specialties providing primary care: Medicine, Family and Community Medicine, Emergency Medicine, Surgery, Ob/GYN, Pediatrics,
Proctoring: Successful completion of Healthstream quizzes , Halogen Learning Management System -courses for each of the waived tests the practitioner is performing at SFGHZSFG , i.e., achievement of passing scores of at least 80% on each module.
Reappointment Competency Documentation: Renewal required every two years with documentation of successful completion of the required Healthstream quizzes , Halogen Learning Management system courses . Provider must have passed each required module with a score of 80%.
Any additional comments: N/A

Commented [JK15]: CIDP suggested changing to generic term in case the eLearning system changes again

Commented [JK16R15]: DET advised "Learning management system (LMS)