

The following is a list of suggested policies and procedures for medical office practices. This list is not all-inclusive. Edit and supplement this list to suit your unique practice.

**Clinical Protocols/Patient Care**

- Telephone triage
- Medications
- Nursing assessment and documentation
- Patient education
- Informed consent
- Follow-up of diagnostic testing and referrals
- Emergency care
- Genetic testing/counseling

**Patient Relations and Confidentiality**

- Termination of care/physician-patient relationship
- Patient complaints

**Health Information Management (Medical Records)**

- Records security
- Retention, storage, and destruction of records
- Release of information/privacy of records
- Back-up and contingency plans for records
- Use of fax/email/Internet

**Laboratory**

- Specimen handling
- Panic values
- Quality controls

**Radiology**

- Use of contrast media
- Pregnancy precautions
- Radiation safety
- Release of imaging materials

**Appointment Scheduling**

- No-shows
- Cancellations
- Referrals to specialists
- Appointment reminders
- Follow-up appointments

**Infection Control**

- Autoclave use and spore testing

- Cleaning, disinfecting, and sterilizing medical equipment and devices
- OSHA Training
- Universal precautions

### **Human Resources**

- Employment policies/employee handbook
- Cell phone/internet use
- Social media
- Job descriptions
- Confidentiality agreement

### **Practice Operations**

- Purchasing
- Accounts receivable/payable
- Billing and collections
- Corporate compliance
- ADA
- HIPAA/HITECH

### **Special Procedures**

- IV sedation
- Use of anesthesia, including local anesthesia
- Monitoring and managing patients during and after procedures

### **Safety**

- Fire safety
- Emergency preparedness
- Hazardous materials

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