ODC OPEN DOOR CLINIC

Increasing Access to Healthcare

# Volunteer Orientation Manual

Open Door Clinic's Administrative Offices in Middlebury

## Welcome!

Our goal at the Open Door Clinic is to help patients access quality medical care with respect and dignity. Our volunteers are our lifeblood. Without their talents and tireless generosity, we would be unable to serve our community.

### Our Staff:

**Heidi Sulis, MPH:** Executive Director. Heidi has been working in health care since 1985. She began her career at the American College of Nurse-Midwives and from there spent three years working for the Frontier Nursing Service in southeastern Kentucky. From 1989 to 2011, she managed the Department of Community Health Outreach at Porter Hospital. Prior to joining the Open Door Clinic staff, Heidi worked at Bristol Internal Medicine, volunteered at clinics and served on ODC's Board of Directors. Heidi earned her Bachelor's Degree in Anthropology and English from Wellesley College, and a Master's Degree in Public Health from Yale Medical School.

**Jody Brakeley, RN:** Clinic Manager and Nurse Case Manager. Jody grew up on a farm in Bridport, earned her BSN at the University of Vermont. She has been a nurse in hospitals and primary care practices in Addison County for 35 years. Jody manages the day-to-day medical operations of the clinic, runs our Middlebury clinics and provides case management for patients.

**Melanie Clark**: Certified Vermont Health Connect Navigator. Melanie assists individuals and small businesses in understanding their health care options, provides information regarding plans and helps individuals choose the plan that best fits their needs. Previously, Melanie worked with the ODC for 13 years as the Tobacco Prevention Coordinator for Addison County, focusing on tobacco prevention and control initiatives.

**Heidi Considine, RDH:** Dental Hygienist and Dental Case Manager. Heidi has always been fascinated with the medical field and has a deep appreciation for the human body and how complicated it can be. She helps people be aware of their oral health status and how to improve it. Heidi holds a Bachelor of Science from the University of Vermont and a degree in Dental Hygiene from Vermont Technical College. She has been working as a dental hygienist since 2009.

**Julia Doucet, RN:** Outreach Nurse and Nurse Case Manager. In addition to managing the Vergennes clinic and providing case management for patients, Julia runs health outreach clinics throughout Addison County, especially targeting migrant farm workers. She is conversational in Spanish and has lived and worked in Mexico and Central America.

**Adam Fasoli, DMD:** Volunteer Dental Director. Adam graduated from Middlebury College with a BA in Religion in 2004, and from Tufts School of Dental Medicine in 2010. He always knew that he wanted to have a career in healthcare, but did not discover dentistry until after he graduated from Middlebury; he cannot imagine being in another profession.

**Christiane Kokubo:** Communication Specialist. Chris received a degree in Journalism from the University of São Paulo (USP) and in Hospitality Management from Senac University, both in Brazil. She is happy to be back to the ODC after a year-long leave of absence, during which time she and her husband took an epic journey driving 30,000 miles from Vermont to São Paulo. They promoted a $1/km fundraising campaign for the ODC while traveling.

**Josh Lanney**: Patient Services Coordinator. Josh assists with the coordination of patient care services. He is responsible for organizing patient visits and coordinating volunteer interpreters. A native of New Hampshire, Josh graduated with a double major in Music and Spanish and a minor in Geography from Saint Michael's College. He has previously been involved with Vermont's migrant worker population as part of Migrant Justice and as a founder of the student organization Juntos at Saint Michael's and the University of Vermont. He is also a professional pianist and a ski coach at Stowe.

**Terence D. Naumann, MD**: Volunteer Medical Director. In addition to volunteering at the ODC and at the People's Health and Wellness Clinic in Barre, Dr. Naumann has been a part time clinical faculty member at UVM College of Medicine since 1985. Dr. Naumann has served on several UVM Department of Family Practice committees and on the Board of Vermont Managed Care. He lives in Richmond with his wife, Ann, a physical therapist at UVMMC who also volunteers at the ODC, and their three children, Maria, Jesse and Alex.

*Revised August 22, 2018*

## Patient Eligibility

In order to qualify for the services of the Open Door Clinic, patients must:

- Be uninsured
- Be underinsured with an insurance deductible equal or greater than 10% of the family's annual income
- Have a household income 300% or below the federal poverty level (FPL)

Patients covered by Medicaid or Medicare are considered insured and are not eligible for our services.

## Volunteer Eligibility

The Open Door Clinic requires that all medical volunteers:

1. Complete a volunteer application
2. Sign and include the confidentiality form with the application
3. Hold current Vermont licenses
4. Provide the clinic copies of relevant licenses, credentials and any requested supporting documentation\
5. Complete an orientation session, online or in person

After receipt of the volunteer application, designated clinic staff will screen all potential volunteers by contacting references provided, completing a National Practitioners Databank Query and State of Vermont Professional License Query.

The Open Door Clinic now participates in the Federal Tort Claims Act (FTCA) Free Clinic Insurance Program that provides malpractice insurance to volunteer healthcare providers free of charge to the clinic. All healthcare providers must be approved by the FTCA before they can provide care in the clinic. Administrative volunteers are covered by the Open Door Clinic's professional liability insurance.

The Open Door Clinic requires that all non-medical volunteers:

1. Complete a volunteer application
2. Sign and include the confidentiality form with the application
3. Complete an orientation session, online or in person

After receipt of the volunteer application, designated clinic staff will screen all potential volunteers by contacting references provided.

## Clinic Sites & Hours

Open Door Clinic's administrative offices: 100 Porter Dr., Middlebury, VT 05753

## Middlebury Clinic

Both the administrative office and Middlebury clinical space are donated by UVM Health Network - Porter Medical Center.

The Middlebury clinic is located at 110 Porter Drive, Middlebury.

- Tuesday evenings from 6pm to 9pm
- One Friday morning a month from 9am to noon

## Vergennes Clinic

The Vergennes clinical space is donated by UVM Health Network – Porter Medical Center – Primary Care Vergennes, formerly known as Little City Family Practice. This clinic is located at Little City Family Practice, 10 North Street, Vergennes.

- Two Thursday evenings a month from 6pm to 9pm

**Services are by appointment only!**

## The Role of the Nurse Case Managers

The nurse case managers work both in the office during the day and at all clinics to provide continuity of care to our patients. They oversee hands-on patient education, resource coordination, consultations with medical specialists and coordinate follow-up care for each patient.

The nurse case managers run each clinic and are aware of resource availability. Please discuss medical recommendations or paperwork questions with them. It is important that each patient check out with them before leaving their appointment.

The nurse case managers will meet with patients regarding follow-up appointments and tests, referrals, medications, financial issues, or to discuss other health issues such as smoking cessation, nutritional support, or to schedule health maintenance exams.

## The Role of the Nurses

All of our clinical nurses are volunteers with a vast array of skills and experience.

## Clinic Preparation

Please arrive at least 15 minutes prior to the start of clinic. If you would like to join us, we provide dinner for our volunteers beginning 30 minutes prior to the start of clinic. A copy of the appointment schedule is available from the nurse case manager to help anticipate the flow of the evening.

## Primary Responsibilities

1. Assess each patient's vital signs and document on Clinic Office Visit note and on vital signs flow sheet. Vital signs include: height, weight, BMI, blood pressure, pulse, respirations, temperature if patient has signs and symptoms of an infection
2. Perform medication reconciliation, verifying each patient's medication, dose, and frequency. If a patient is taking all medications as prescribed please document this, as well as any discrepancies, in the nursing section of the clinic visit note.
3. Assess and document medication allergies and specific reactions to each.
4. Assess and document ETOH and tobacco use and patient's desire to quit.
5. Assess and document the dates of patient's last tetanus and flu vaccine.
6. Perform PHQ-2, and if score is more than 3, perform PHQ-9.
7. On the clinic visit note, document the nature of the visit with a brief history and **sign your name.**
8. If an interpreter is necessary, document this in the appropriate space.
9. Perform a vision assessment if a green vision sticker is on the clinic visit note.
10. Administer vaccines as ordered.
11. Assist Provider as necessary.
12. Clean and prepare each exam room with necessary supplies.

## Post-Clinic

Help the case manager clean up exam rooms and put away supplies. Assist in collecting and disposing of all trash.

## Sign Up

If possible, please sign up to volunteer at another clinic before leaving.

## The Role of the Physicians and Nurse Practitioners

Our primary care providers are expected to provide high quality, respectful, compassionate, culturally competent care to each patient. Our patient population includes native Vermonters as well as a large number of migrant farm workers both seasonal and semi-permanent. Providers often have 30 minutes or more with each patient to help deal with the extra time requirements of working with patients who often haven't seen a provider for a long time, and for the extra time required for foreign language interpreting.

Patient concerns include the typical family medicine diagnoses of health maintenance, depression, HTN, DM and overuse injuries. Providers should familiarize themselves with the services we provide in-house, such as physical therapy, nutritional counseling, mental health counseling, prescription assistance, pharmacist led medication management, smoking cessation assistance as well as a Vermont Health Connect Navigator. Attention to oral health care is encouraged as our new dental care program addresses both preventative and restorative dental care issues. Referrals to all subspecialists can be arranged when indicated. As you may very well be the only health care provider that the patient sees this year, attention to the whole patient is appropriate.

Since all of our patients are uninsured or underinsured, providers must be certain that if any prescriptions are written, that the patient can afford them. This can be helped by selecting an Rx from the $4 per month list at local pharmacies and by asking the patient if they will be able to afford it. Marbleworks Pharmacy offers Open Door Clinic patients a discount on prescriptions as well. Our patients do not incur charges for lab and x-ray services and potentially expensive referrals can often be provided at no or reduced charge to the patient. Providers should discuss any patient financial barriers with the Nurse Case Manager at clinic who can often help find solutions. Follow up visits should be arranged at appropriate intervals.

The Nurse Case Managers run each clinic and are aware of resource availability. Please discuss medical recommendations or any questions with them. It is important that each patient check out with them before leaving their appointment. The Nurse Case Managers will meet with patients regarding follow-up appointments and tests, referrals, medications, financial issues, or to discuss other health issues such as smoking cessation, nutritional support, or to schedule health maintenance exams. They also assess every patient for their health insurance options.

Please arrive at least 15 minutes prior to the start of clinic. If you would like to join us, we provide dinner for our volunteers beginning 30 minutes prior to the start of clinic. A copy of the appointment schedule is available from the Nurse Case Manager to help anticipate the flow of the evening.

The nurses will check in each patient and put them in an exam room. Anticipated supplies will be set up. If additional resources are needed, the nurse or Case Manager can assist you in accessing them.

## Record-keeping

We use a paper clinic visit note for each patient visit documenting in the SOAP note format. Please remember to complete and sign each note before the end of the evening.

Often a patient's chart has lab/radiology results attached to the front. Providers review these labs with the patient and document this in the appropriate space. If further action is required, this should be documented on the lab/radiology report.

## Medications

The Open Door Clinic and Marbleworks Pharmacy work together to try to make medications as affordable as possible. All ODC patients receive a discount on prescriptions that are filled at any of the three Marbleworks Pharmacies (Middlebury, Bristol, and Vergennes). Many medications for chronic conditions are available through low-cost budget plans through other pharmacies. Whenever possible, medical providers should write prescriptions for the generic version of the medications. The Nurse Case Manager can assist in finding the most affordable option for patients.

**The ODC does not prescribe any controlled substances including narcotics or stimulants.**

## Patient Teaching

We have patient education materials available. Please ask the Nurse Case Manager if you have a specific need.

## Check Out Procedure

All patients must check out with the Nurse Case Manager before departure. A check-out form is included in the patient's paperwork that providers receive. Providers should note any blood work, radiology, medical referrals, vaccines, or follow-up needed by the patient on the check-out form.

## Labs and X-rays

Labs and radiological procedures are performed free of cost by UVM Health Network - Porter Medical Center for our patients. The Nurse Case Manager will arrange for all ordered tests to be performed.

Nurses can perform urinalyses, urine pregnancy tests, rapid strep tests, blood glucose levels, fecal occult blood tests, PPDs, vaccines and EKGs on-site. All radiological procedures ordered must have a signed requisition that includes known diagnosis and/or signs and symptoms. Lab requisitions also need to be signed by the medical provider, with a diagnosis listed.

## Vaccines

Providers should ensure that each patient's immunizations status is up to date. The Open Door Clinic can provide the following vaccines to patients at no cost:

- Tdap
- Pneumovax
- Hepatitis A
- Hepatitis B
- HPV
- Seasonal flu (when available)

## ODC In-House Referrals

We have several specialists who provide free services through the clinic. These include:

- Physical therapists
- Chiropractors
- Registered dieticians
- Mental health providers
- Pharmacists (for smoking cessation and medication management)
- Diabetic educators
- Confidential HIV testing and counseling

If the patient can benefit from any of the above services, the Nurse Case Manager can assist with a referral.

## Medical Referral Outside of the Open Door Clinic

The Open Door Clinic works closely with UVM Health Network - Porter Medical Center and affiliated providers for referrals to medical specialists. The Nurse Case Manager can assist the provider in determining the appropriate specialist for the referral. Our patients are usually eligible for UVM Health Network and Porter Medical Center financial assistance which may allow discounted referral appointments.

## Patient Follow-up

Please review labs and x-ray reports that have come back, and document on the lab result slip in the patient chart if follow-up is needed. Due to the time between volunteering sessions, it will usually be necessary for another provider to follow-up on patients who you have seen.
Because you are all volunteers, it is not anticipated nor expected that you will follow up with the patients you see at clinic, outside of clinic hours. Follow up will be provided by the ODC staff and as needed, in conjunction with Terry Naumann MD, Medical Director. Patients will be scheduled for follow up appointments at clinic as needed.

## Sign Up

If possible, please sign up to volunteer at another clinic before leaving!

## Front Desk Volunteer

You are the face of the clinic! You are the first person our patients see when they enter. Smile, greet the patients warmly, and check them in for their appointment. The Nurse Case Manager will provide you with a copy of Front Desk Volunteer Duties to assist you during clinic.
Please arrive at least 15 minutes prior to the start of clinic. If you would like to join us, we provide dinner for our volunteers beginning 30 minutes prior to the start of clinic. A copy of the appointment schedule is available from the nurse case manager to help anticipate the flow of the evening.

## Patient Check-in Procedure

### For current patients

Ask the patient to review their cover sheet.

1. If all the information is correct, have them sign and date the bottom of the cover sheet. Make a pile of all cover sheets. If any information is incorrect, have them write in the changes, the sign and date the bottom of the sheet. Add to the pile of cover sheets.
2. Place the patient chart in the hanging basket for the nurse.
3. Have the patient take a seat in the waiting room until the nurse calls them for their appointment.

### For new patients

1. Ask the patient how to spell his/her first and last name and for her/his date of birth. Document this on the blank clinic visit note. Do not rely on the clinic roster for the correct spelling.
2. Give the patient the first group of papers which you will find on the chart. This includes: Intake sheet; Consent for Purposes of Treatment and Healthcare Operations; Free Clinic Federal Tort Claims Act (FTCA) and Patient Notice of Limited Liability of FTCA Deemed Volunteers; Health Information Policy; and Introduction to the Open Door Clinic.
3. Have the patient read and complete all information requested on the first three forms. The last two sheets are informational handouts for the patient to keep.
4. While the patient is completing the above paperwork, fill out the following information on each form in pen:
   Clinic Visit Note: Today's date, patient's name, DOB, clinic location.

Check Out form: Today's date, and Patient's name.
Master Problem List: Patient's name and DOB.
Medication Sheet: Patient's name, DOB and gender.
Case Manager Sheet: Patient's name and DOB.
Vital Sign Sheet: Patient's name, DOB and gender.

5. When the patient returns the forms they have completed, put the intake form on the front of the chart with the other paperwork and put in the hanging basket for the nurse. The Consent to Treat and FTCA forms should be added to the pile of cover sheets you have started.
6. Please don't start a chart until the patient arrives, as some new patients are "no shows."

## Patient Check Out Procedure

1. If the patient needs a follow-up visit, record the patient's name, reason for visit and phone number **in pencil**, in the appointment book. If the patient is unsure of the reason for the follow-up visit, you can ask the Nurse Case Manager. Give the patient a reminder card with their name, date and time of the next appointment. Circle the location of the next appointment: Middlebury or Vergennes

2. Please do not let the patient leave before they check out with the Nurse Case Manager.

## Maintaining Professional Boundaries

Delivering optimal care to our patients requires that we all maintain professional boundaries in our professional relationships with patients, families and colleagues. All staff and volunteers are individually responsible for applying and maintaining appropriate boundaries in their work at the ODC. Maintaining these boundaries and relationships with patients who we see at clinic and may interact with in the community can be particularly challenging.

We have an ethical obligation to our patients and their families to practice within professional guidelines and codes of conduct. Examples of personal or social boundary violations include seeing patients in unorthodox settings for the convenience of the provider, loaning a patient money, sharing personal information with the patient or transporting patients for any reason other than to a medical appointment. Any form of sexual activity with a patient is a clear boundary violation. Best practice and delivering optimal care requires our diligence.

It is ODC policy that all volunteers:

- Keep personal information private, including phone numbers and home addresses. That said, we recognize that sharing a little bit of personal information helps build a trusting relationship and can make a volunteer medical provider feel more real and accessible.

- Keep all relationships professional and do not engage in social interactions outside of clinic hours either in person or via electronic communication such as email or social networking sites. We understand that Addison County is a small rural community and a provider or volunteer may be unable to avoid social contact with patients. When this occurs, it is important to be cognizant of the context in which the interaction is taking place and act accordingly.
- Not accept personal gifts. Often a patient will bring special foods or treats and present them directly to one staff/volunteer. It is appropriate to graciously accept these gifts in the context of the entire volunteer team or office.

- Only visit patients at home when on work related business. Home visits should be arranged through clinic staff and every effort should be made to have two volunteers present at every home visit.

Should there be a complaint regarding the breaching of professional boundaries, the relevant ODC staff will discuss the matter with the volunteer concerned and offer appropriate support and assistance.

## SEXUAL HARASSMENT
POLICY & PROCEDURE

### POLICY

To protect staff and volunteers from unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature, the Open Door Clinic has instituted a policy of *no tolerance* regarding conduct that constitutes sexual harassment.

### RESPONSIBILITY

Case Manager
Clinic Coordinator
Any staff or volunteers

### PROCEDURE

1. Conduct of a sexual nature constitutes sexual harassment when:
   a) Submission to the conduct is made either an explicit or implicit condition of employment or volunteer participation;
   b) Submission to or rejection of the conduct is used as the basis for employment decision affecting the harassed employee or volunteer;
   c) The harassment unreasonably interferes with an employee's or volunteer's work performance or creates an intimidating, hostile or offensive work environment.

2. Any individual staff member or participant who feels that he or she has been subjected to sexual harassment is encouraged to:
   a) Inform the harasser directly that the conduct is unwelcome and must stop,
   b) And/or report such incidents to the Clinic Director or to a member of the Board of Directors, immediately, without fear of reprisal. Confidentiality will be maintained to the extent possible.
3. All complaints will be handled promptly.
4. In determining whether the alleged conduct constitutes sexual harassment, the totality of the circumstances, the nature of the harassment and the context in which the alleged incidents occurred will be investigated.
5. Appropriate corrective action, up to and including discharge of the perpetrator, may be taken to remedy all violations of this policy.
6. The decision of the Executive Director may be appealed to the full Personnel Committee

# ACCESS TO STAFF, VOLUNTEER, STUDENT & VISITORS INFORMATION

POLICY & PROCEDURE

## POLICY

Employees, volunteers and students have the right to expect that personal and confidential information will be held in confidence. Therefore, all information specific to and identifying of individuals, families, employees, volunteers and students is presumed to be confidential and subject to this policy.

## RESPONSIBILITY

Clinic Director
Case Manager
All staff, volunteers and students

## PROCEDURE

1. Only that information needed to fulfill the goal of meeting administrative or legal obligations will be collected and appropriately recorded for each employee, volunteer, student or visitor.
2. No information about an employee, volunteer or student will be released without prior consent, unless directly connected with the administration of a program or necessary for compliance with federal or state laws or regulations.
3. Information that does not identify an employee, volunteer, student or visitor may be used for statistical research, forecasting program needs, or other such purposes.
4. Employees or volunteers must release sufficient information to comply with mandatory reporting requirements for cases involving the abuse, neglect, or exploitation of children and persons who are elderly or who have disabilities.
5. Information may be released without consent when Vermont law creates a duty to warn identified individuals of potential harm to person or property, in response to court orders, or to investigate or report criminal activity as purpose and content of the report; the name, address and affiliation required by federal or state law or regulation.
6. Only information relevant to the specific situation will be disclosed.
7. The disclosure will be documented to include: the date, of the person to whom the information was released; notification of client when applicable.
8. Prior to releasing confidential information, the ODC will obtain the volunteer or employee's informed consent except as noted in #4-7 above.

**The Open Door Clinic discourages all volunteers from providing any personal or confidential information to patients, such as cell phone numbers, home addresses, Facebook names or any other social media connections.**

# CONFIDENTIALITY

POLICY & PROCEDURE

## POLICY

The Open Door Clinic Health Information Policy describes how a patient's medical information may be used. Confidential patient information will also be protected during clinic and administrative office activities.

## RESPONSIBILITY

Clinic Director, Case Manager, all staff and volunteers

## PROCEDURE

1. Find a private space to review sensitive information with a patient. Pull a patient aside to review a test result, inquire about a medication dosage, or pose a financial question. **The waiting room is a public space**.
2. Refer to patients in the waiting room by first name only.
3. Do not discuss patient information in front of others. The casual banter between employees may divulge confidential patient information.
4. The written record is an extension of the patient. Read only what you need to read in order to deliver care, and keep the record protected from the casual glance of others.
5. Staff members, volunteers, or students will refer all requests for information to either the Case Manager or the Clinic Director.
6. No staff member, volunteer, or student will acknowledge that an individual is or is not a client without written consent from the client.
7. If a client has consented or requested, in writing, that information be released, staff member or volunteer will comply at the direction of the Case Manager or Clinic Director.
8. All staff, volunteers, students and, when applicable, members of the Board of Directors will also abide by the Open Door Clinic's Health Information Policy.
9. All employees, volunteers, students or when applicable, members of the Board of Directors, will receive a copy of this policy, Confidentiality Policy, the Access to Staff, Volunteer and Student Information Policy and the Health Information Policy and sign a statement acknowledging review of these policies and understanding of protection of patient confidentiality.
10. A copy of the acknowledgement statement will be given to the staff member, volunteer, or student and the original will be retained in the personnel file.

*Approved October 2004*

## APPENDIX

**Porter Medical Center**
Cardiology: 388-5614

**Chiropractic Services**
Dr. Jim McDaniel, DC: 388-0970

**Dental**
Middlebury Dental Group: 388-3553
Dr. Brian Saltzman: 388-7045

**Ear Nose Throat**
Porter ENT: 388-5657

**Eye Care**
Middlebury Eye Associates: 388-8265
Eye Care Associates (Exchange St): 388-3291

**General Surgeon**
Dr. Carl Petri: 388-9885

**Obstetrics / Gynecology**
Addison Associates in OB/GYN: 388-6326/388-6347

**Orthopedics**
Champlain Valley Orthopedics: 388-4881

**Urology - Dr. Andrew Mahoney**
UVM MC Urology – Middlebury Office: 388-0643