

PCN RN RESPONSIBILITY CHECKLIST TEMPLATE

The purpose of this document is to record all tasks and responsibilities for all stakeholders during PCN RN clinic onboarding and orientation.

- This checklist acts as a safeguard, helping to ensure both clinics are RNs are properly supported and provide clarity on key roles and responsibilities.
- A structured onboarding and orientation process will facilitate a smooth transition and integration into clinic operations and workflow.
- This template allows all stakeholders to codesign the workflow details and collaboratively build out the checklist for participation in the PCN RN program, based on clinic needs and RN skillset.

Once finalized and approved by all stakeholders, this checklist will be brought to each check-in meeting during the RN's first year in the clinic.

If a clinic does not meet the agreed responsibilities by target dates, the Division will support the clinic to address any concerns and course correct. If failure to meet responsibilities continues, clinics may be removed from the PCN RN program and will face losing this resource.

First Day Checklist: Responsibilities for the RN and the clinic to complete **by the end of the RN's first day in the clinic**, to ensure the RN has a smooth transition into their role and is prepared to hit the ground running.

[Insert clinic name] will commit to:

Responsibility	Completed	Date	Est time	MRP	Related docs / notes
1. Greeting & welcoming - detail on getting to the clinic (parking etc.), exchanging emails in advance of the first day	☐	Click or tap to enter a date.			
2. Emergency exit plan or any procedures related to emergent situations (fire exit, first aid kit, fire extinguisher, stairs and elevators location, back door (if applicable))	☐	Click or tap to enter a date.			
3. Access to safety supplies such as safety caps needles and PPE for handling hazardous drugs	☐	Click or tap to enter a date.			
4. Overview of clinic HR policy (if applicable)	☐	Click or tap to enter a date.			

5. Review and sign HR paperwork	☐	Click or tap to enter a date.			
6. Review the RN Scope of Practice	☐	Click or tap to enter a date.			
7. Policies & procedures: Privacy & security training	☐	Click or tap to enter a date.			
8. Policies & procedures: Patient and staff incident and safety	☐	Click or tap to enter a date.			
9. Policies & procedures: Expectation around sick days, holidays & late notice procedures	☐	Click or tap to enter a date.			
10. Policies & procedures: Communication with staff and doctors	☐	Click or tap to enter a date.			
11. Policies & procedures: Overview of clinic conflict resolution process	☐	Click or tap to enter a date.			
12. Policies & procedures: Confidentiality agreements	☐	Click or tap to enter a date.			
13. Policies & procedures: Team charting agreements	☐	Click or tap to enter a date.			
14. Clinic tour including dedicated space for the nurse, parking & storage, kitchen & staff room	☐	Click or tap to enter a date.			
15. Overview of typical day physical workflow - If possible, provide an overview of a typical day in the nurse's life as it relates to physical space	☐	Click or tap to enter a date.			
16. Keys, supplies and office equipment	☐	Click or tap to enter a date.			
17. Introductions to staff & doctors	☐	Click or tap to enter a date.			
18. IT tour: passwords to computers & login info	☐	Click or tap to enter a date.			
19. IT tour: Wifi login & password	☐	Click or tap to enter a date.			
20. IT tour: Necessary software installment overview	☐	Click or tap to enter a date.			
21. IT tour: Virtual tech walkthrough	☐	Click or tap to enter a date.			
22. IT tour: Remote access (if applicable)	☐	Click or tap to enter a date.			

23. IT tour: Where to find IT resources (if additional reading required)	☐	Click or tap to enter a date.			
24. IT tour: IT support contact	☐	Click or tap to enter a date.			
25. IT tour: ax machine & printers walkthrough IT tour: ax machine & printers walkthrough	☐	Click or tap to enter a date.			
26. IT tour: Clinic email addresses	☐	Click or tap to enter a date.			
27. EMR access and training: navigation, documentation standards, accessing practice schedule & caseloads, charting workflows and encounter reporting	☐	Click or tap to enter a date.			
28. Workflow overview: patient scheduling	☐	Click or tap to enter a date.			
29. Workflow overview: Overview of hours of operation and peak hours	☐	Click or tap to enter a date.			
30. Workflow overview: virtual care tools	☐	Click or tap to enter a date.			
31. Workflow overview: use of phones, faxes & printers during the day & who operates them	☐	Click or tap to enter a date.			
32. Workflow overview: doctor's & MOA schedules	☐	Click or tap to enter a date.			
33. Workflow overview: cleaning schedules	☐	Click or tap to enter a date.			
34. Reading materials for RN (if applicable) & next steps for day 2	☐	Click or tap to enter a date.			

1 Month Checklist: Responsibilities for the Division, VCH, the RN and the clinic to complete **in advance of the 1-month RN check in meeting**, to ensure the RN integrates successfully into clinic workflow and operations.

The Division will commit to:

Responsibility	Completed	Date	Comment
1. Three / four onboarding meetings with the Physician / Primary Care Clinic Leads - to explain the RN Program and eligibility	☐	Click or tap to enter a date.	

2. Provide access to the Vancouver RN Resources SharePoint site for resources	☐	Click or tap to enter a date.	
3. Support clinics and RN to co-design the RN workflow	☐	Click or tap to enter a date.	
4. Review attachment reporting and encounter reporting	☐	Click or tap to enter a date.	
5. Points of contact (VCH & Division) explained e.g. how and where to raise any issues / concerns / questions	☐	Click or tap to enter a date.	

VCH will commit to:

Responsibility	Completed	Date	Comment
1. Review RN Task List and Scope of Practice with clinic	☐	Click or tap to enter a date.	
2. Review Template of RN contract with clinic	☐	Click or tap to enter a date.	
3. Review VCH HR Policies and Procedures with clinic	☐	Click or tap to enter a date.	
4. RN and Provider met for an informal meet & greet	☐	Click or tap to enter a date.	
5. Discuss and review contract and overhead payment arrangements	☐	Click or tap to enter a date.	

The RN will commit to:

Responsibility	Completed	Date	Comment
1. Emergency supplies - expiration, refill, recommend for reordering	☐	Click or tap to enter a date.	
2. Review of the RN workflow with Clinic Manager, Physician Lead and/or other Providers - to share feedback and suggest adjustments where necessary e.g. how much time is needed to book for certain appointments	☐	Click or tap to enter a date.	
3.	☐	Click or tap to enter a date.	
4.	☐	Click or tap to enter a date.	

5.	☐	Click or tap to enter a date.	
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[Insert clinic name] will commit to:

Responsibility	Completed	Date	MRP	Comments
1. Provide access to an emergency / first aid kit for patient medical emergencies, which contains appropriate emergency medication based on the risk assessment. Clinics should refer to the CPSBC <i>Emergency Preparedness for Staff and Patients in a Family Practice Clinical Office</i> for guidance on what to include. The contents are dependent on the workflow & tasks.	☐	Click or tap to enter a date.		
2. Arrange and complete individual Provider shadow shifts	☐	Click or tap to enter a date.		
3. Educate all Providers and MOAs on RN program and key roles to support workflow e.g. appropriate patients, scheduling patients	☐	Click or tap to enter a date.		
4. Ensure Primary Care Clinic Leads including MRP and Clinic Manager have thoroughly read through the RN Scope of Practice and come to RN for any questions	☐	Click or tap to enter a date.		
5. Emergency supplies - expiration, refill, reordering	☐	Click or tap to enter a date.		
6. Regularly review the RN Scope of Practice	☐	Click or tap to enter a date.		

3 Month Checklist: Responsibilities for the Division, VCH, the RN and the clinic to complete **in advance of the 3-month RN check in meeting**, to ensure the RN integrates successfully into clinic workflow and operations.

[Insert clinic name] will commit to:

Responsibility	Completed	Date	MRP	Comments
1. RN inclusion in clinic-wide meetings with providers and/or Clinic Leadership	☐	Click or tap to enter a date.		
2. Develop a communication pathway for the RN to update Providers on scope of practice and discuss any patient referrals	☐	Click or tap to enter a date.		
3.	☐	Click or tap to enter a date.		

4.	☐	Click or tap to enter a date.		
5.	☐	Click or tap to enter a date.		

Annual Checklist: Responsibilities for the Division, VCH, the RN and the clinic to complete **in advance of the annual shadow shift and RN check in meeting**, to ensure the RN integrates successfully into clinic workflow and operations.

The Division will commit to:

Responsibility	Completed	Date	Comment
1. 3 months check in meeting with Clinic in person on site at clinic	☐	Click or tap to enter a date.	
2. Annual check in meeting with clinic in person on site at clinic	☐	Click or tap to enter a date.	
3. Following up regarding clinic closures	☐	Click or tap to enter a date.	
4. Email check-ins to assess how things are going and any clinic needs	☐	Click or tap to enter a date.	
5.	☐	Click or tap to enter a date.	

VCH will commit to:

Responsibility	Completed	Date	Comment
1. Support RNs to access training and education for specific tasks relevant to patient needs & clinic RN workflow	☐	Click or tap to enter a date.	
2.	☐	Click or tap to enter a date.	
3.	☐	Click or tap to enter a date.	
4.	☐	Click or tap to enter a date.	
5.	☐	Click or tap to enter a date.	

The RN will commit to:

Responsibility	Completed	Date	Comment
1. Conducts regular review and maintenance of the VCH PCN RN Scope of Practice, incorporating new education and attending available education as applicable to evolving practice needs.	☐	Click or tap to enter a date.	
2. Engages in ongoing discussions with clinic leads and providers regarding potential additions or changes to their scope of practice.	☐	Click or tap to enter a date.	
3. Regularly review the skills and knowledge of PCN RNs relevant to their practice, and engage in ongoing discussions with the VCH educator and leadership team to identify and address any gaps.	☐	Click or tap to enter a date.	
4. Demonstrates awareness of the PCN RN scope of practice as defined by VCH and ALWAYS works within these limits.	☐	Click or tap to enter a date.	
5. Communicates with clinic providers and leadership when clarification around scope is needed.	☐	Click or tap to enter a date.	

[Insert clinic name] will commit to:

Responsibility	Completed	Date	MRP	Comments
1. Continuing RN inclusion in regular clinic-wide meetings with providers and/or Clinic Leadership	☐	Click or tap to enter a date.		
2.	☐	Click or tap to enter a date.		
3.	☐	Click or tap to enter a date.		
4.	☐	Click or tap to enter a date.		
5.	☐	Click or tap to enter a date.		

Once all responsibilities have been worked out and agreed, this checklist will be used to refer to at each check in meeting during the RN's first year in the clinic.

Click or tap to enter a date.