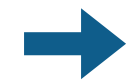


ROLES DEFINED

Please note that this chart shows the promotional path from a Registered Nurse to Clinical Leader as well as Clinical Leader to Nurse Manager. The blended portions of the chart shows the similarities between roles while also listing the distinction in responsibility. The promotional track below does not require additional licensure to transition.

Registered Nurse



Clinical Leader



Nurse Manager

- Modifies plan and expected outcomes as based on patient responses and changes in status.
- Obtains data that integrates patient's diagnoses, physical/psychosocial findings, patient/family perceptions of illness, learning needs and culture.

1. **Identifies and reports** any issues related to patient care, operation, and quality outcomes to the Clinical Leader or Nurse Manager to resolve patient relation issues. **Collaborates** with interdisciplinary team on patient outcomes.

2. **Participates** on committees/teams/councils. **Pursues** educational opportunities by attending and presenting educational programs and in services. **Shares** information learned from current literature and programs with peers.

3. **Serves** as a preceptor to students and unlicensed nursing personnel.

4. **Delegates** appropriate tasks to ancillary workers. **Directs/coordinates** care, oversees care provided by licensed/unlicensed nursing staff while retaining accountability for quality of care provided to patients.

- Provide fiscal direction for the unit, managing resources and orders in a fiscally responsible manner.
- Oversee all clinic functioning - day to day operations.
- Sets goals for quality measures.

1. **Identifies** potential conflict situations with patients, facilitates resolution, and initiates request for assistance when situation warrants. **Provides** service recovery and appropriately elevates complaints when indicated.

2. **Provides** oversight and direction for shared governance activities. **Works collaboratively** with Clinical Nurse Specialist, Educators, and other Clinical Training Specialists to develop and implement educational programs and plans.

3. **Mentors and orients** charge nurses. **Mentors and orients** charge nurses in monitoring and adjusting staffing in response to unit needs. **Participates** in biweekly new employee orientation meetings as needed.

4. **Delegates** appropriate tasks to ancillary workers. Role model/mentor for staff. **Implements and incorporates** situational leadership into daily unit interactions and activities.

A. **Facilitates** new employee orientation and biweekly meetings.

B. **Adjust** staffing to meet the needs of the unit in collaboration with administrative supervisors and other units. **Monitors and adjusts** staffing in response to unit needs.

C. **Supports** nurse residency participants. **Uses** situational leadership to assist staff in reaching goals.

D. **Participates** in the formation, implementation, and evaluation of unit goals. Takes steps to **decrease** stress and/or increase the effectiveness of coping mechanisms of patients/families having extreme or unexpected difficulty dealing with illness and hospitalization.

E. **Drives** customer service and patient experience activities.

- Management of daily clinic operations
- Adheres to communication plan between leadership roles.
- Models' effective communication and promotes cooperatives behaviors.

1. **Interacts** with and makes decisions and resolves patient relation issues.

2. **Provides** oversight and direction for shared governance activities.

• Staff Management Duties:

- Provides evaluation of unit employees in collaboration with other Ambulatory Management.
- Has final accountability of staff scheduling, payroll, and scheduling standards.
- Employs collaborative interviewing with ultimate hiring decision.
- Manages tracks and trends LOA, FMLA, intermittent leaves, and time and attendance.

A. **Oversees** new employee orientation and biweekly meetings.

B. **Real time staffing adjustment**, responsive to unit and staffing needs - final accountability.

C. **Supports** nurse residency programming and staff development.

D. **Responsible and accountable** for unit quality. **Analyzes** trends and develops action plans for optimal outcomes in collaboration with unit staff and other disciplines.

E. **Drives** Evidence Based Practice and ensures adherence to standards of care and compliance with hospital policy.

ROLES DEFINED

Please note that this chart shows the promotional path from a Licensed Practical Nurse to Registered Nurse to Clinical Leader. The blended portions of the chart shows the similarities between roles while also listing the distinction in responsibility. The promotional track below requires additional licensure to transition from an Licensed Practical Nurse to a Registered Nurse.

Licensed Practical Nurse → Registered Nurse → Clinical Leader

- Reports and documents patient responses to care, interventions, and progress toward attainment of individualized outcomes.
- Communicates observations related to patient behaviors, affect, interactions with others and responses to safety interventions to RN.

1. Consistently **collaborates and communicates** with members of the interdisciplinary team about patients. **Integrates** care with other team members.

- Initiates requests for assistance, identifies potential conflict when situations warrant it facilitating initial resolution and elevating to appropriate supervisor when needed.
- Delivers/obtains specimens, supplies and equipment as needed. Notifies appropriate person.

- A. Collects/Observes and reports** data that integrates patient's diagnoses, physical/psychosocial findings, patient/family perceptions of illness, learning needs and culture.
- B. Reports, observes, and documents** patient responses to care and progress toward attainment of individualized outcomes.
- C. Responds** appropriately in emergencies by summoning help, obtaining equipment, initiating CPR and/or attending to patients and unit needs as directed.
- D. Delegates** appropriate tasks to ancillary workers. **Directs/coordinates** care, oversees care provided by unlicensed nursing staff while retaining accountability for quality of care provided to patients.
- E. Provides** instruction to meet patient/family needs utilizing appropriate instructional material.

- Modifies plan and expected outcomes as based on patient responses and changes in status.

1. **Identifies and reports** any issues related to patient care, operation, and quality outcomes to the Clinical Leader or Nurse Manager to resolve patient relation issues. **Collaborates** with interdisciplinary team on patient outcomes.

2. **Participates** on committees/teams/councils. **Pursues** educational opportunities by attending and presenting educational programs and in services. **Shares** information learned from current literature and programs with peers.
3. **Serves** as a preceptor to students and unlicensed nursing personnel.
4. **Delegates** appropriate tasks to ancillary workers. **Directs/coordinates** care, oversees care provided by licensed/unlicensed nursing staff while retaining accountability for quality of care provided to patients.

- A. Obtains** data that integrates patient's diagnoses, physical/psychosocial findings, patient/family perceptions of illness, learning needs and culture.
- B. Assesses** patient status upon entry, **establishes** priorities of care, documents plan and expected outcomes/progress with patients and family.
- C. Anticipates** emergencies and takes immediate and appropriate action.
- D. Delegates** appropriate tasks to ancillary workers. **Directs/coordinates** care, oversees care provided by licensed/unlicensed nursing staff while retaining accountability for quality of care provided to patients.
- E. Implements** education plan to meet patient/family needs utilizing appropriate instructional material.

- Provide fiscal direction for the unit, managing resources and orders in a fiscally responsible manner.
- Oversee all clinic functioning- day to day operations.
- Sets goals for quality measures.

1. **Identifies** potential conflict situations with patients, facilitates resolution, and initiates request for assistance when situation warrants. **Provides** service recovery and appropriately elevates complaints when indicated.

2. **Provides** oversight and direction for shared governance activities. **Works collaboratively** with Clinical Nurse Specialist, Educators, and other Clinical Training Specialists to develop and implement educational programs and plans.
3. **Mentors and orients** charge nurses. **Mentors and orients** charge nurses in monitoring and adjusting staffing in response to unit needs. **Participates** in biweekly new employee orientation meetings as needed.
4. **Delegates** appropriate tasks to ancillary workers. Role model/mentor for staff. **Implements and incorporates** situational leadership into daily unit interactions and activities.

ROLES DEFINED

Please note that this chart shows the promotional path from a Medical Office Assistant to a Licensed Practical Nurse and from a Licensed Practical Nurse to a Registered Nurse. The blended portions of the chart shows the similarities between roles while also listing the distinction in responsibility. The promotional track below requires additional licensure to transition from a Medical Office Assistant to a Licensed Practical Nurse and from a Licensed Practical Nurse to a Registered Nurse.

Medical Office Assistant → Licensed Practical Nurse → Registered Nurse

- Checks insurance eligibility and as needed, obtains prior approval from insurance companies. Determines required co-payments, collects patient payments and provides receipts.
- Performs patient reception, monitors patient flow, schedules appointments, including return visits or coordination of additional laboratory tests, and handles appointment changes.
- Processes incoming/outgoing mail and reports; sorts and delivers mail to designated personnel and patients; and prepares routine correspondence. Copies and collates materials, faxes information, performs data input, and files.
- Reviews and processes patient charges by reviewing encounter tickets containing CPT codes and entering the codes and charges into the computer system.
- Processes medical orders, patient orders, and health care provider orders in accordance with established policy and in accordance with the documents in the patient's medical record. This includes scheduling follow-up appointments and entering lab information into the computer system.

1. **Serves** as a resource to new staff, students and other Upstate personnel.
2. **Communicate** observations related to patient behaviors, affect, interactions with others.

Note: The responsibilities listed below are written identically for both roles:

- **Cleans** and **prepares** instruments and **disposes** of contaminated supplies in accordance with established procedures.
- **Performs** simple, non-sterile dressing changes and other appropriate duties as assigned by licensed personnel.
- **Delivers/obtains** specimens, supplies and equipment as needed. Notifies appropriate person.
- Under the direction of the registered nurse, may **obtain, document, and notify** registered nurse of test results obtained via point of care testing and any other standard of care testing.
- **Prepares** daily patient scheduling reports. **Transcribes** or processes order as needed. Routes patient correspondence and information as required.

- Initiates requests for assistance, identifies potential conflict when situations warrant it facilitating initial resolution and elevating to appropriate supervisor when needed.

- A. Consistently **collaborates and communicates** with members of the interdisciplinary team about patients. **Integrates** care with other team members.
- B. **Reports, observes, and documents** patient responses to care and progress toward attainment of individualized outcomes.
- C. **Responds** appropriately in emergencies by summoning help, obtaining equipment, initiating CPR and/or attending to patients and unit needs as directed.
- D. **Delegates** appropriate tasks to ancillary workers. **Directs/coordinates** care, oversees care provided by unlicensed nursing staff while retaining accountability for quality of care provided to patients.
- E. **Provides** instruction to meet patient/family needs utilizing appropriate instructional material.

1. **Serves** as a resource to new staff, students and other Upstate personnel, this may include acting as a formal preceptor.
2. **Communicates** observations related to patient behaviors, affect, interactions with others and responses to safety interventions to RN.

- Modifies plan and expected outcomes as based on patient responses and changes in status.
- Participates on committees/teams/councils. Pursues educational opportunities by attending and presenting educational programs and in services. Shares information learned from current literature and programs with peers.
- Serves as a preceptor to students and unlicensed nursing personnel.

- A. **Identifies and reports** any issues related to patient care, operation, and quality outcomes to the Clinical Leader or Nurse Manager to resolve patient relation issues. **Collaborates** with interdisciplinary team on patient outcomes.
- B. **Assesses** patient status upon entry, **establishes** priorities of care, documents plan and expected outcomes/progress with patients and family.
- C. **Anticipates** emergencies and takes immediate and appropriate action.
- D. **Delegates** appropriate tasks to ancillary workers. **Directs/coordinates** care, oversees care provided by licensed/unlicensed nursing staff while retaining accountability for quality of care provided to patients.
- E. **Implements** education plan to meet patient/family needs utilizing appropriate instructional material.