

# **Volunteer Handbook 2011-2012**



**ALLIANCE MEDICAL MINISTRY**

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## **Introduction to AMM**

Alliance Medical Ministry (AMM) founded in 2000, began clinical operations in January of 2003 in a small clinic located next door to Wake Med. AMM provides affordable primary care services to uninsured, working/lower income adults in Wake County, Monday through Friday (and Saturday mornings), by appointment. Nearly 13,000 patient visits occurred in 2007 alone. With this growing need came the launching of The Hope & Healing Campaign, which allowed Alliance to purchase and transform the 18,000 square foot *Hope Fellowship Baptist Church* property into a newly expanded medical clinic to better serve our growing number of clients in Wake County. The new clinic opened its doors in February, 2008. Renovations and expanded space allows Alliance to have 21 exam rooms, additional sub-specialty clinics (such as eye care), a daily urgent care/walk-in clinic with expanded hours, full laboratory, medical records, patient medical library, large meeting hall and sanctuary for educational programs, and office space for staff and volunteers.

Our financial support comes from the medical community, many area congregations, corporations, foundations, and individual donors. With their help, we continue to providing invaluable, cost-saving health care services to better meet the needs of the increasing number of uninsured working families in our community.

### **Our Mission**

Alliance is a faith-led medical ministry serving the uninsured working poor in need of affordable primary health care services.

### **Our Vision**

Alliance Medical Ministry will deliver high quality affordable primary care, preventative medicine and health education by working collaboratively with key partners to serve working uninsured adults in Wake County. Our programs will be creative, innovative and be an integral part of the continuum of care available for the working uninsured.

### **Those We Serve**

We serve uninsured adult men and women ages 18-64 who work or live with a working adult that resides in Wake County.

## AMM Staff Members

<b>AMM Staff</b>	<b>Position</b>	<b>Work Status</b>
Sean Harrison	Executive Director	FT
Dr. Tara Lewis	Medical Director	FT
Dr. Sheryl Joyner	Physician	PT
Dr. Ann McLauren	Physician	PT
Dr. Mike Watson	Physician	FT
Joi Williams	Chaplain	PT
Mendi Nieters	Development Director	FT
RuthAnn Marenji	Pharmacy Assistant	FT
Tina Burney	Phlebotomist	FT
Kim Conklin, RN	Nurse Manager	FT
Regina Heroux, RN	Program Director	PT
Michelle Miles	Operations Director	FT
Bertha Escamilla	Certified Nursing Assistant	FT
Leanne Ritter	Cert. Medical Technician	FT
Ingrid Escobar	PA Referral Coordinator	FT
Natalie Pinto	Receptionist	FT
Kimberly Petersen	Front Desk Coordinator	FT
Bianka Espinal	Receptionist	FT
Robin Schroeder	RN	PT
Maria Pinto	RN	FT

For questions or cancellations, we ask that all volunteers call either the main # **(250-3320)** and enter the extension (Regina- 422; Michelle- 429; Dr. Lewis- 418; or Kim Conklin- 412) to leave a message; or if more urgent, please call the back-line # to reach one of us directly at **250-3582**. Advance notice for cancelling a shift is requested, unless extenuating circumstances prohibit you from doing so. Email notification of any scheduling conflict is acceptable as well, if given in advance.

# Volunteer Expectations/Roles

## AMM VOLUNTEER JOB DESCRIPTION

<b>Volunteer Assignment Title:</b>	Volunteer
<b>Service Area/locations:</b>	Front desk, clinic area, library, pharmacy, community events, project access, data entry, Acute Care Clinic
<b>Hours and Days of Assignment:</b>	Monday - Saturday: 9:00 – 12:00 Monday-Friday: 1:00 - 4:00 pm *special programs as needed
<b>Reports to:</b>	Regina Heroux, Program Director
<b>Interrelationships:</b>	The staff of AMM, patients and their families, physicians, other volunteers.

### **Role and Purpose of Assignment:**

The volunteers assist staff and/or patients/family members in utilizing the services of AMM; and/or representing AMM to the surrounding community. They provide guidance and support by assisting and enabling staff and/or patients with daily clinic and non-clinic needs. The volunteers serve a vital role in the day-to-day operations of AMM, and serve as an invaluable information/communication link between patients, family, staff and community members who will use the services, or want to learn more about AMM.

### **Potential Job Duties/Responsibilities:**

- a. Provide support and assistance to patients and staff by identifying and providing front desk assistance, including phone and/or computer assistance.
- b. Provide assistance to clinical staff and patients in clinic by triaging needs; assisting with lab or pharmacy needs, etc.
- c. Identify patients who may need additional resources/support and refer them to the appropriate staff member.
- d. As directed, provide follow-up phone-calls to patients.
- e. Staff the designated areas of the clinic.
- f. Compile files, charts, materials, etc.
- g. Effectively use the copy machine, computer, and audio-visual equipment (TV/VCR, CD radio). Training will be provided as needed.
- h. Escort new patients on tours and to designated areas (lab, nurse's station, clinic, etc.) as needed.
- i. Perform related duties as requested.

### **Behavioral Expectations:**

- Exhibits a friendly, professional manner in all communications. Remains polite and courteous of all parties; actively listens/maintains a **humble**, helpful and understanding manner of the unique needs of the patients seen at AMM.
- Projects a strong, service-oriented attitude toward all patients, visitors and staff.
- Adheres to all safety standards, policies and procedures. Reports any accidents or unsafe working condition or equipment to the Director or Nurse Manager. Practices Universal Precautions.
- Abides by AMM rules and regulations; understands and follows the confidentiality policy. Follows HIPAA regulations. Refrains from seeking information that is not needed to complete job duties. (see Confidentiality Policy)
- Strives to maintain a clean and orderly environment.
- Dresses according to expectation (casual, but not disheveled).
- Signs in and out of the Volunteer Log each time and wears badge/nametag when working and leaves volunteer badge at clinic before leaving their shift.
- Respects AMM's smoke-free environment.
- Accepts responsibility for continuous improvement by making suggestions to the Director/Supervisor and/or communicating concerns/needs.
- Refrains from using strong odors, i.e. colognes, perfumes, etc.
- Reflects the values of the organization.

### **Skills and Qualifications:**

- Able to understand and abide by the confidentiality policy.
- Able to meet the attendance requirements of the assignment.
- Have excellent/appropriate customer relations/service skills.
- Basic knowledge and comfort in dealing with underserved patients.
- Excellent listening/communication skills, including good phone etiquette, when appropriate.
- Able to work with *minimal* dependency after ample precepting is provided.

### **Training & On-going Reinforcement Plan:**

- Attends General Orientation, when provided.
- Shadows an AMM employee to learn specific job duties as part of their orientation.
- Successfully completes any/all training and demonstrates confidentiality.
- Completes any/all annual requirements, including, but not limited to, safety/infection control, confidentiality, HIPAA, etc.
- Maintains contact with Director to update her with any volunteer needs/concerns or change in volunteer status (i.e. need to become inactive for a period of time, etc.).
- Attends periodic in-services and/or other volunteer meetings, if offered.
- If volunteer is part of an internship/work study program, duties will be curtailed to areas of interest/study (i.e. Business, IT, Marketing, etc.)
- If an MD/RN, NP/PA, must have valid NC licensure in order to perform medical duties/tasks. If license is pending, will be allowed to serve in a triage-type role only.

**HIPAA: a brief overview**

The Health Insurance Portability and Accountability Act of 1996 (HIPAA) outlines federal regulations governing the privacy and security of health information and electronic data transactions. A key goal of HIPAA is to protect patient privacy and confidentiality. Under HIPAA, staff and volunteers are required by law to protect all health/medical information with significant penalties to those that violate patient privacy. The law prohibits anyone from disclosing patient names, birth dates, phone/fax numbers, emails, SSN, medical-related information, pictures, or any other unique identifying factor or characteristic with anyone outside of the immediate health care team (on a need to know basis), without permission by the patient.

**AMM Confidentiality Policy:**

As an unpaid volunteer, my signature below signifies that all patient information is treated with the utmost confidentiality out of respect for the patient and for legal and ethical reasons. My signature further signifies my understanding that many of the communications between Alliance Medical Ministry (AMM) and its patients are protected by law as privileged or otherwise confidential and information is highly confidential for this reason. Thus, as a condition of service as a volunteer for AMM, you are required not to: 1) Misappropriate 2) Disclose to any third party, either directly or indirectly or aid anyone else in disclosing to any third party, directly or indirectly, all or any part of any AMM confidential information. All volunteers are required to maintain strict confidentiality at all times concerning confidential information to which they may be privy. Accordingly, it shall be the right of AMM to discipline or terminate any volunteer who breeches such confidentiality. My signature below signifies that I understand and will abide by the conditions of this policy. **(Defer if already signed)**

Volunteer signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Volunteer Applicant Certification of Information** (applies to clinical personnel)

My signature below indicates that I have provided true and complete information on this application. I further understand that false, omitted, or misleading information may result in the rejection/termination of my volunteer work with Alliance Medical Ministry. I also understand that any professional licensure or registration will be verified, if required for the volunteer work performed on behalf of the ministry.

Volunteer signature: \_\_\_\_\_ Date: \_\_\_\_\_

**\*Note: No need to complete this form if already done so with volunteer application**

# Volunteer Opportunities

- 1. *Assembling Blank Charts:*** Getting charts ready for use by making copies, inserting forms and divider sheets and applying chart numbers on the side of chart.  
*Training requirements:* Brief orientation.  
*Time commitment:* 2 hours a week at your convenience. You could choose to come every week, 2 weeks a month, or 1 week a month.
- 2. *Morning or Afternoon Receptionist:*** Greeting patients, answering the phone, scheduling appointments, and checking patients out.  
*Training Requirements:* One three-hour training session in advance of assignment.  
*Time Commitment:* 8:30 am to 12:30 pm or 12:30 –5:00 pm one day a week or every other week or agree to be on our back-up list to work on short notice when another volunteer has to cancel. Note: The clinic is open the second Saturday morning of each month.
- 3. *Language Interpreter:*** Assist our Spanish-speaking, or French-speaking, or Korean-speaking patients as needed—filling out paperwork, translating for the doctors (if certified), making follow-up and reminder calls, giving instructions, and making appointments.  
*Training Requirements:* Fluency in Spanish, French, Vietnamese, or Korean  
*Time Commitment:* 8:30 am – 12:30 pm or 12:30 pm – 4:30 pm one day a week or every other week or agree to be on our back-up list to volunteer on short notice when another volunteer has to cancel.
- 4. *Requesting Records from Other Facilities:*** Filling out a request form and either calling in or faxing the request.  
*Training Requirements:* Brief orientation  
*Time Commitment:* 1-2 hours a week, every other week, or every month.
- 5. *Assisting Volunteer Doctor(s):*** Taking vital signs and recording these along with patient medications, allergies, and ENT problem on form. Record findings for doctor during exam.  
*Training Requirements:* LPN/RN/CNA, approximately one hour of orientation.  
*Time Commitment:* Second Thursday of every month or every other month from 12 noon to 3 pm.; and or Saturday's 9 am to noon.
- 6. *Filing/Checking Charts:*** Checking charts for phone numbers, patient name, chart number, and re-shelving.  
*Training Requirements:* Brief Orientation.  
*Time Commitment:* Two hours weekly.
- 7. *Triaging Patients:*** (RN/MD students) Weighing patients, checking vital signs, asking about medication and allergies, and writing concise statement of patient's health problems.  
*Training Requirements:* Current NC license as RN, LPN, NP, PA, MD or NA certified. Up to one hour of basic orientation; assigned preceptor will determine shadowing schedule and appropriate amount of time necessary to learn role.

*Time Commitment:* One morning or afternoon every week, every two weeks or every month.

MD Volunteer role: training and time commitment is designated per Medical Director and/or Executive Director.

8. **Scribes:** Assist Medical Provider to enter/transcribe clinical notes in EMR.

*Training Requirements:* Detail-oriented person, with understanding of medical terminology and familiarity of electronic medical records (or desire to learn). One hour of orientation.

*Time Commitment:* 2-3 hours/day, every week or every other week.

9. **Project Access:** Filing out one-page form, interviewing patients about number in family, employment, benefits and income. Making appointments with specialists or for radiological procedures and keeping precise records.

*Training Requirements:* RN, LPN, or experience with medical records and procedures. Two to three hours of orientation.

*Time Commitment:* Two to four hours every week or every other week.

10. **Medicine acquisition/Data Base Entry:** Entering patient demographic/medical information and/or conducting telephone follow-up with patient to complete documentation, if needed.

*Training Requirement:* precise, organized, detail-oriented person. Two to three hours orientation (Review Confidentiality Policy in clinic).

*Time commitment:* 4 hours each week.

11. **Runners:** Will assist medical staff in getting patients to/from waiting area when ready to be seen and placing them in designated patient room; and assisting with needs (Ex. Making copies of patient forms/materials, etc.) and/or directing them patients to other locations within clinic (Ex. lab, check-out, etc).

*Training requirement:* High school student at least 16 years of age or older.

*Time commitment:* once/week.

12. **Outreach Events:** Assisting Development Coordinator with health fairs, holiday gift wrapping, and/or special events/mailings that help promote awareness and/enhance funding opportunities for AMM.

*Training Requirement:* Must enjoy interacting with people, have an adequate understanding of AMM, and be comfortable working with large groups or in the community, as needed.

13. **Other:** If you have any special talents, skills, or interests, including such as facilities maintenance/handyman, interior design, gardening/yard work, artist, exercise instructor, etc. then let us know so we can create that special role just for you or a group!

## AMM's Expectations

We recognize the **enormous** value volunteers provide in the day-to-day work and service offered through Alliance. We have come to depend on competent volunteers who are dedicated and caring and help to enhance and extend the services we provide. As such, we encourage volunteer input, suggestions, and concerns to help us maximize our services and to help grow more efficiently as a team.

While we maintain quality work expectations, we recognize that some volunteers may require more/less training and/or observation time in a particular area they will be working in to maximize their experience and service efforts. Your readiness is important in helping us “get the job done.” We challenge our volunteers when working to ask themselves “what can I learn today that will make me a better volunteer and stimulate a better experience for me?” We want you to have pride in your service as we do and will never intentionally provide tasks that are beyond a volunteer’s scope of responsibility. Above all, we are and remain grateful for each and every volunteer, regardless of how little or how much time you are able to give. In 2008, we will be launching a new sign-in log book (eventually will go electronic) to help us (and you) keep track of the number of service hours given by each volunteer with Alliance. Throughout the year, we will plan to give special recognition to our volunteers for birthdays in the newsletter and an annual gratitude gathering to help honor you and the invaluable time you have given!

If you are volunteering as part of an *internship program* at Alliance, you will be expected to review our volunteer handbook and follow applicable guidelines, even though your purpose with us is solely for learning. Your main assignment will be developed by your preceptor (MD, RN, Pharmacist, etc.), who will ultimately be your point of contact and monitor/evaluate your overall experience with us. Interns will be given a special volunteer orientation by the preceptor or supervisor you will be working with. All necessary paperwork will be completed by the Director or designated supervisor. The Medical Director will make any/all arrangements for medical students and NP volunteers.

We recognize that feedback is important to growth and well-being for all of us. The designated supervisor in your area, as well as the Director, will make certain to give you periodic feedback regarding conduct and work performance and is available to help assist a volunteer through any challenges that may arise. We will also offer an annual performance review which will be a brief meeting between you and the Director (or designated supervisor of your area). This is helpful in providing an update or reinforcement of work-related performance, expectations, and an opportunity for volunteers to provide personal feedback and self-evaluation. Although this occurs once a year, we strongly encourage volunteers to provide feedback throughout the year.

Good *communication* is a must at Alliance. Because of our size and nature of our business, we recognize that some days can be extremely busy, whereby staff can be multi-tasking at any given time. While we never discourage a volunteer from asking questions, we will have/maintain a volunteer scheduling *board* in the Blue Pod

We will also post volunteer-related information in the sign-in room (Library) about upcoming activities, general or specific clinic messages; as well as the Volunteer log-in book, badges and a folder that can serve as a suggestion box. Volunteers can also provide questions/concerns that were not asked or addressed during their work shift. A volunteer can expect a response to their question/concern by the time they are scheduled to work again. In the volunteer break room, we will have copies of Alliance newsletters, reports, and/or memo's that we encourage volunteers to read to help them stay informed and in touch, along with a place to keep belongings. Alliance hosts several community events, activities, such as the spring soiree, health fairs and other various fund-raising opportunities. These types of opportunities will be posted on the communication board to encourage volunteer participation. Remember, volunteers are the face of Alliance- both inside the clinic and out in the community. In order to educate others about our services, we encourage participation in Alliance-related activities/functions from time to time- to help us spread the word!

Our goal is to always maintain a *safe*, friendly and positive work-environment to help volunteers do their best work; however, there may be days when the clinic may operate in an extremely busy/hectic fashion and distractions may be inevitable. We encourage volunteers to stay motivated and empowered to help us find ways to remove any potential negativity- especially if it impacts patient care. We are conscientious of environmental factors that could potentially prohibit volunteers from doing their job or even endanger them or patients. Thus, *safety* remains a high priority, as we would never allow a volunteer to engage in any task that could pose a risk to their health. If at any time a volunteer feels concerned about their or someone else's safety, we ask that the concern immediately to a Director or a designated supervisor. The appropriate steps will be taken to prevent or rectify the need or situation. Safety should be everyone's responsibility and reporting potential safety concerns is very important. Please notify your supervisor if you are injured while volunteering. Use good body mechanics when lifting, reaching, bending (with your knees) or turning (never twist- always pivot using your feet). Never lift anything too heavy and carry items close to your body. Prevent infection by making certain you are current with your TB or other necessary vaccines. Practice good hand washing technique (use waterless alcohol gel or soap hands and rub rigorously for 15 seconds before rinsing under running water) and do so before/after arriving, using the bathroom, eating, or prior to any physical contact with patients who may be sick. Use good judgment and never touch blood or any other products that are labeled with a "warning" or "biohazard". Most importantly, never come to work if you are sick; however, please call and let us know if you are unable to make it. Failing to call in more than two times, may affect your ability to work here.

At Alliance we believe in a *shared responsibility* approach to training and maintaining volunteer satisfaction and growth. Every new volunteer will receive a tour of the clinic that will include the volunteer break room; and an introduction to the various members of the staff, along with their designated responsibilities. A mini-orientation and handbook will be provided after the initial volunteer visit/interview and a schedule assigned with the designated supervisor of the area chosen (i.e. front desk). Volunteers will complete a reasonable monitored period or be able to verbalize comfort of task before any level of

independence is established. Because we are a small staff, we all feel a personal sense of involvement for our volunteer's personal growth. At any given time when a volunteer is working, we strongly encourage you to introduce yourself to staff you are unfamiliar with. Also, you are welcomed join us for staff-related functions, activities, or lunch. *Dress code* is casual, but no jeans. Please be mindful that your attire should not look disheveled or "slept in". How you dress is a direct reflection on you as well as Alliance. We will also have Volunteer badges for you to wear when you arrive. **This and our log-in process will be described in depth during your orientation. It is imperative that you sign in and out of the volunteer log book and return your badge before you leave.** *Also, cell phones are acceptable if kept on vibrate.*

As a volunteer, you are an invaluable part of our team! We will strive to make your working experience a positive and motivating one that enhances your abilities, team work and open communication, which ultimately benefits those we serve. Thank you for choosing to be part of the Alliance Medical Ministry family.

*"I believe in those who care. I believe the work they do is both deceptively simple and unusually difficult...They (volunteers) bestow a priceless gift: Only themselves, and all of themselves...."*

**Excerpts from James E. Miller**

# Physician-Employee/Volunteer Professional Relationships Alliance Medical Ministry

## **Purpose:**

To establish Alliance Medical Ministry's professional guidelines surrounding the subject of providers rendering medical and/or mental health care to employees and volunteers. Realizing that there may be many benefits associated with providing care to employees and volunteers, this practice is prohibited at this clinic due to the possibility of disrupting personal and professional boundaries, creating role conflicts on the behalf of the providers as well as unrealistic expectations of the providers by employees and volunteers. Violation of these boundaries can have enormous ethical, personal, and medical-legal implications.

## **Policy:**

Dual relationships in the medical office setting can potentially be a serious challenge for physicians and physician extenders (*collectively known as providers*). These relationships are best described as the merger of professional and social roles that occur when providers treat employees and/or volunteers, family members, and friends. Alliance Medical Ministry providers are prohibited under this policy from rendering medical and/or mental health care to employees and volunteers.

In numerous medical publications, it has been recommended that providers be extra cautious when rendering healthcare to employees due to the concern of the loss of personal objectivity, role conflicts, and the potential for invasion of privacy & breaches of confidentiality. For this reason, all employees and volunteers alike are required to seek medical and mental health care with external providers which is allowed under the Sick Leave & Paid Time Off policies for employees.

# Volunteer Provider (MD/PA/NP) Addendum

## Prescribing Policy:

- 1) No Benzodiazepam's or narcotics.
- 2) Consider generics when at all possible; consider \$4 formularies (list is available at Nurses station). Feel free to ask one of the nurses if we carry samples.

## Services Not Offered at AMM:

- 1) We do not treat work-related injuries.
- 2) We do not provide evaluations for disability.

## Referrals:

We apply to Project Access for scheduled procedures, such as MRI's, CT scans, and specialty consults.

**Unscheduled tests (i.e. plain films)** are ordered via order slips (use Wake Med order as an example) for patient to take to Wake Med Registration. Explain to patient that there will be a charge for this service, which must be emphasized before they are sent over.

## Lab Services:

Most lab work is done onsite, but please refer to our list as a reference (available in Nurses station).

*Specialized orders* (such as Vitamin D level) that are not done on sight are sent to Wake Med for drawing, which again, will be billed and needs to be explained to the patient. For questions about this please feel free to ask Dr. Lewis, Kim Conklin, RN, or Robin Glover (Phlebotomist).

Professional Licensure Update: We need updated copies of the following for each provider file: Please bring in the following copies and give to Dr. Lewis.

Copy of current Malpractice Coverage

Copy of current DEA Certificate

Copy of current Privilege License