TENNESSEE CHARITABLE CARE NETWORK

Standard Operating Procedure Template

This is an adaptable Standard Operating Procedure template that can be customized for organization specific workflows. We suggest outlining all clinic workflows, documenting the standard, determining if any need modification, and establishing a review timeline to ensure maintained accuracy. Also consider how these will be organized and stored, and who will need ongoing access to the information.

SOP Title

- Example: *Patient Intake and Triage*

Effective Date / Review Date

- Effective:
- Next Review:

Version History

Version	Date	Description	Author

1. Purpose

A brief statement describing **why** this SOP exists.
Example: To ensure consistent and accurate collection of patient vitals and history during intake.

2. Scope

Describe **who** and **what** this SOP applies to.
Example: Applies to all Medical Assistants and Nurses performing patient intake at the community clinic.

3. Definitions & Abbreviations

Clarify any essential terms, preferably only using approved abbreviations.
Examples:

- **POC** – Point-of-care

- **Triage** – Prioritization of patient needs based on severity

4. Responsibilities

Identify roles involved and their responsibilities.
Example:

- **Medical Assistants:** Perform initial intake, record vitals.
- **Nurses:** Review intake notes, escalate concerns.
- **Clinicians:** Review findings and assess the patient.

5. Required Equipment & Supplies

List any tools, devices, or materials needed.
Examples: Blood pressure cuff, thermometer, pulse oximeter, EHR workstation.

6. Procedure (Step-by-Step Instructions)

Use clear, numbered steps that describe **how to perform the task**.

Example:

1. Greet the patient and verify two identifiers (name and DOB).
2. Confirm reason for visit and update demographic information if needed.
3. Record vital signs: BP, pulse, temperature, respiratory rate, SpO_2.
4. Document information in the EHR.
5. Notify RN/Provider immediately if vitals are out of normal ranges or patient shows concern.
6. Clean equipment according to infection-control guidelines.

7. Safety & Infection Control Considerations

Highlight anything that prevents risk or ensures compliance.
Examples: Use PPE when indicated, disinfect surfaces between patients, follow sharps disposal procedures.*

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8. Documentation Requirements

Describe what must be recorded and where.
Example: All vitals must be entered in the EHR before the provider sees the patient.

9. Quality Assurance & Compliance Metrics

Explain how compliance is monitored.
Examples:

- Random chart audits monthly
- Performance checked during annual competency review

10. References & Attachments