

PHMI Guidance for Creating and Implementing a Standing Order

The following is a step-by-step guide to help practices develop and implement a comprehensive policy:

1. Identify the Need and Scope:

- **Determine which procedures/treatments require standing orders:** Focus on common, low-risk interventions like vaccinations, routine lab tests, medication refills for stable conditions, and specific screenings.
- **Define the patient populations the policy will cover:** Be specific about age groups, conditions, and other relevant demographics.
- **Consider regulatory requirements:** Ensure the policy aligns with local, state, and federal regulations, as well as professional guidelines.

2. Form a Policy Development Team:

- **Include key stakeholders:** This should involve physicians, nurses, pharmacists, administrators, and legal counsel.
- **Assign roles and responsibilities:** Clearly define who is responsible for drafting, reviewing, approving, and implementing the policy.

3. Develop the Policy Content:

- **Title and Purpose:** Clearly state the name of the policy and its objective.
- **Definitions:** Define any technical terms used in the policy.
- **Procedures Covered:** List each procedure or treatment included in the standing order, specifying:
 - **Indications:** When the standing order can be used.
 - **Contraindications:** When the standing order should *not* be used.
 - **Dosage/Frequency:** Clear instructions on how to administer the treatment.
 - **Required Documentation:** What needs to be documented in the patient's chart.
 - **Staff Authorized to Implement:** Specify which staff members (e.g., RNs, LPNs, medical assistants) are authorized to carry out the standing orders.
- **Patient Criteria:** Outline the specific criteria a patient must meet for the standing order to be applicable. This might include age, medical history, current medications, etc.
- **Assessment Requirements:** Detail the necessary assessments that must be performed before implementing the standing order. This could include vital signs, allergies, and relevant medical history.

- **Communication Protocols:** Describe how staff should communicate with providers regarding the implementation of the standing order, including when to notify a provider immediately (e.g., adverse reactions, deviations from the standard protocol).
- **Monitoring and Follow-up:** Specify any required monitoring after the intervention and the procedures for follow-up care.
- **Documentation Requirements:** Outline the specific documentation required in the patient's medical record, including the date, time, staff member administering the treatment, and any patient response.
- **Training and Competency:** Describe the training required for staff to implement the standing orders and how competency will be assessed.
- **Review and Revision Process:** Establish a schedule for reviewing and updating the policy (e.g., annually or as needed).
- **Approval Signatures:** Include spaces for relevant personnel to sign and date the policy, indicating their approval.

4. Review and Approval Process:

- **Circulate the draft policy:** Share the draft with all members of the policy development team for feedback.
- **Incorporate feedback:** Revise the policy based on the received feedback.
- **Obtain formal approval:** Secure approval from the medical director, nursing director, and other relevant authorities.

5. Implementation and Training:

- **Communicate the policy:** Inform all relevant staff about the new policy and its implications.
- **Provide training:** Conduct thorough training sessions for staff who will be implementing the standing orders. This should include a review of the policy, practical demonstrations, and opportunities for questions.
- **Ensure competency:** Implement a process to assess staff competency in implementing the standing orders.

6. Monitoring and Evaluation:

- **Track usage:** Monitor how frequently the standing orders are being used and for which procedures.
- **Review outcomes:** Regularly assess patient outcomes associated with the use of standing orders.
- **Gather feedback:** Solicit feedback from staff on the effectiveness and practicality of the policy.
- **Conduct audits:** Periodically audit patient records to ensure compliance with the policy.

7. Policy Review and Updates:

- **Regularly review the policy:** At least annually, review the policy to ensure it remains relevant, accurate, and effective.
- **Update as needed:** Revise the policy based on changes in best practices, regulations, or feedback from staff and patients.

Key Considerations for Community Clinics:

- **Patient Population Diversity:** Consider the diverse needs and cultural backgrounds of your patient population when developing the policy.
- **Language Access:** Ensure the policy and related materials are available in languages commonly spoken by your patients.
- **Resource Availability:** Consider the resources available at your clinic when determining which procedures can be safely and effectively implemented through standing orders.
- **Collaboration with Providers:** Maintain open communication and collaboration with providers to ensure they are comfortable with the scope and implementation of the standing order policy.

Example Elements for Specific Procedures:

- **Vaccinations:** Specify vaccine types, dosages, administration routes, and documentation requirements (e.g., lot numbers, expiration dates). Include protocols for managing adverse reactions.
- **Routine Lab Tests:** List specific tests that can be ordered under standing orders, criteria for ordering, and procedures for handling abnormal results.
- **Medication Refills:** Define criteria for refilling medications for stable chronic conditions, including the number of refills allowed and when a provider review is required.